Rosa Drown

# Educating Roma Children
## Going beyond integration

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# Contents

# Preface

Some years ago, when in Romania, I was asked for help by a charity representing Roma families. The families told me that their children attended school but apparently learned nothing. At this time many of the traditional occupations of Roma families such as skilled craft work and agricultural labouring had disappeared as such occupations had been taken over by factory made products or agricultural machines. This meant that it was essential for their children to be able to read and write in order to obtain employment after they had left school. School directors and teachers also told me that Roma children were attending school in increasing numbers but they seemed unable to teach them successfully. They also asked me for help. Although I am experienced teacher who had already carried out projects in different Romanian schools, I had no ready solutions for the families or the schools, even following visits to different villages and schools, including those that had participated in European Union funded projects for improving education for Roma. I also talked to other experts involved with Roma education, read reports and research literature which also covered other countries; however, I was unable to discover any ready solutions that proved to be successful over the long term.

As well as being a teacher, I had also worked on research projects in Romania's health sector contributing my knowledge in research methods from a master's degree. Therefore, I was fortunate to be in a position to undertake detailed research to see what was happening in schools on a day to day basis with regard to Roma education. I was encouraged to do this by both academics, project workers and evaluators in Romania because it was something that had not been investigated in detail by someone who was already involved in education as a former teacher.

My research found that it was not sufficient for schools to be integrated and policy statements made about the need for inclusive education without a

clear distinction made about what inclusive education entailed and ensuring that the school structure, including curriculum demands enables teachers to understand and practice inclusive education. I also found that both policy makers and schools did not take into account the difficulties faced by many Roma families in engaging with schools. Recent reports on Roma education in Romania and other European countries have shown that although the majority of schools are now integrated, much more work needs to be done to give Roma children equal access to quality education or even to prevent them from dropping out of school altogether (FRA, 2016; EC, 2019).

This book is intended to help policy makers, educational practitioners, researchers and anyone else who is concerned about the education of this historically disadvantaged people who form a significant part of our society in Europe and elsewhere. It may also be useful to those who are concerned with migrant children where families are unfamiliar with the culture of their new country.

# Abbreviations

| | |
|---|---|
| CCD | Casa Corpului Dictactic (a county in-service training department) |
| CEDIME | Center for Documentation and Information on Minorities in Europe |
| CEE | Central and Eastern Europe |
| CoE | Council of Europe |
| CST | Critical Social Theory |
| EC | European Commission |
| EFA | Education for All |
| EU | European Union |
| EUMAP | The European Monitoring and Advisory Program |
| FRA | European Union Agency for Fundamental Rights |
| ID | Identity Card |
| INSET | In service training |
| INSETRom | In-service training for Roma inclusion |
| INTERSECT | A classroom observation tool (Interactions for Sex Equity in Classroom Teaching) |
| MER | Romanian Ministry responsible for education |
| MPI | Romanian Government Ministry for Public Information |
| NAR | National Agency for Roma (Romanian) |
| NGO | Non-Governmental Organisations |
| OSI | Open Society Institutions |
| PHARE | Pre-accession Funds, financed by the EU, to assist applicant countries |
| TES | Traveller Education Services |
| UNICEF | United Nations International Children's Emergency Fund |
| WB | World Bank |

# INTRODUCTION

For more than 50 years, concerns have been expressed about the education of
Roma children (Plowden, 1967; Liegeois, 1998; Hancock, 2010a). Research
has shown that many Roma children have either never attended, have
abandoned school, or have otherwise had less benefit from school education
in comparison with the non-Roma children within their nation state (Save
the Children, 2001c; FRA, 2014; EC, 2016). As a consequence of the
democratisation of former communist countries which were known to have
a comparatively large minority of Roma (CoE, 2014) and who wished to
apply for membership of the European Union (EU), a decision was made in
1993 to oblige countries applying for membership to create policies,
enshrined in law, to improve the Roma situation, including their education
(EC, 2003; Pusca, 2012).

In Romania the government initiated such a policy in 2001 as a ten-year
strategy which included education as one of its domains. Although the initial
document laying out the strategy was published by the Ministry of Public
Information (MPI,2001), The Ministry of Education (MER) was charged with
developing and executing the domain of education. As one of their goals was
a distinctive policy of 'equal access to quality education' for Roma children.
The European Monitory and Advisory Program (EUMAP) also described many
internationally-funded projects which have worked to improve the education
for Roma children in Romania and elsewhere (EUMAP, 2007a, 2007b). In
its country overview of equal access to quality education for Roma in eight
former communist countries, EUMAP praised Romania in particular, stating
that it "has made great strides" in implementing relevant policies (EUMAP,
2007b, p.47). Despite this praise, the effects on the ground in Romania have
been reported in a range of sources as, at best, minimal. For example:

> "little progress could be identified" (EUMAP, 2007a, p.366).

> "There is not so much to conclude on education as an agent of change
> in the social situation of the Roma, except to say that this is not the case.
> The Romanian school system has not yet succeeded in ensuring the
> right to education for Roma pupils" (Fleck and Rughiniș, 2008, p.177).

> "Some progress has been made but mostly locally with limited impact"
> (Șandru, 2010, p.30)

The European Commission (EC), in their report on quality education,
considered that the quality of education was "a concern of the highest
political priority…for active citizenship, employment and social cohesion"
(EC, 2001, p.5) and that it was a state's responsibility to provide educational
systems that were inclusive in order to offer children and young people the
opportunity to benefit from school education My intention was therefore to
focus my research on how the Romanian education system was working
address such problems in order to inform policy-makers, practitioners and
others with a stake in Roma education so that they gain a better insight into
the factors affecting a realisation of the policy to achieve equal access to
quality education for Roma children.

I decided to confine the research to rural communities in Transylvania, a
large region of Romania, distinctive by its history and physically separated by
two mountain ranges from the rest of Romania. As well as being familiar with
the area, Transylvania has been estimated to have the highest proportion of
Roma to non-Roma people in Romania (CEDIME-SE, 2001) as well as other
countries in Europe, as illustrated in Chapter 1.2.

Rural communities in Romania are divided into small self-administrative
districts (commune), usually including two or more villages, presided by an
elected mayor and councillors, who have responsibilities to provide services,
including social worker(s) and schools. A district's school system usually
includes kindergartens and primary and junior-secondary schools within a
single management system which, at the time of this study, comprised an
education commission, headed by the mayor, and a schools' director who

had responsibility for the schools and kindergartens. The schools' director and teachers were employed by the county schools' inspectorate, who in turn receives orders about implementing educational policy from the national education ministry (MER). My study focused on one such rural area.

A research study which starts with the premise that a policy appears to have had little success in improving equal access to quality education for Roma children could appear to take a deficit viewpoint of the situation and look for the problems rather than improvements in the quality of education for Roma children. I took the position, however, that there had been no detailed research that had considered what was happening in the day-to-day situation of the school environment within the context of the Romanian government's policy of 'equal access to quality education' for Roma children. Therefore, I wished to explore the situation at grass roots level, without making any presuppositions about the policy's successes or failures. Consequently, the research was built on a study of the following research question and sub-questions:

**The Research Question and Sub-questions**

***What are the perceptions and practices in a rural Transylvanian community that affect the realisation of the Romanian Government's policy to achieve 'equal access to quality education for Roma children'?***

Sub-questions:

1. *What are the stated perceptions of the county school inspectorate, local council administrators, teachers and parents of the policy to achieve equal access to quality education for Roma?*
2. *What are the current practices in the case study area that affect the realisation of the 'policy', regarding the education of Roma children?*

In relation to the above research questions, I defined 'perceptions' as what a person knows about and understands by the relevant policy and 'practices'

as those activities which relate to the school education of Roma children. Hereinafter, I refer to the Romanian government's policy to achieve equal access to quality education for Roma children as the 'policy'. I also use Colebatch's (2009) authoritarian model which refers to a government policy, laid down through legislation and ordinances (see Appendix 2).

The research question led to my decision to develop a design based on an interpretative approach. Willis (2007) proposed that "for interpretivists, what the world means to the means to the person or group being studied is critically important" (p.6). Cresswell (2007) also contended that in social constructivism, (which he stated is often combined with interpretivism):

> "Researchers often address the 'processes' of interaction amongst individuals. They also focus on the specific contexts in which people live… [they] that recognize that their own background shapes their interpretation, and they 'position themselves' in the research" (p.21).

Mainly qualitative data was used but I also used quantitative data in order to complement and illuminate the findings, provided that they did not address the same question and that ontological assumptions were made clear.

I then considered the possibilities of where and how data could be collected within Transylvania's rural districts. A single case study of how one rural area implemented the 'policy' made it possible to consider classroom processes in much more depth than other options because I was able to focus on what happened during school lessons, not only from the perceptions of parents, children and teachers, but by directly observing lessons qualitatively as well as quantitatively.

I chose an exploratory case study because, as proposed by Thomas (2011), I was faced with a problem where I needed "to know more: what is happening and why?" (p.104). By selecting an exploratory case study of the implementation of the 'policy' within the schools' system of a small self-administrative rural district, I was able to choose an area where I was already known by all ethnic groups, teachers in the schools and members of the local administration.

Also, through carrying out educational projects within the county I was known to some members of the County's school inspectorate. This gave me a more detailed understanding of the context of both the rural district and the system of education and made it possible, in many cases, to gain direct access to participants. Selecting a case study for this reason is considered valid by Yin (2009), Thomas (2011) and Schwartz-Shea and Yanow (2012).

Stake (2005) proposed that "[c]ase study research is not a methodological choice but a choice of what is to be studied" (p.443). Accepting this definition, I studied the implementation of the 'policy' within a single rural self-administering district, with a population of approximately 4,200 was made up of Romanian (61%), Hungarian (24%) and Roma (15%) ethnic groups. Roma people in the district had either Romanian or Hungarian as their main language or were bilingual in both languages. Roma language, if spoken, was a second or third language, apart from a few families in one of the three distinct Roma communities who lived on the outskirts of the villages, where some children spoke a mixture of two or three languages. This information was provided by local administration officers, who keep information about the demography of their district, while information about the languages used by Roma children in the schools was confirmed by teachers and the region's Roma representative.

The case study included Roma children within the rural district who were eligible to be enrolled and attend its two village schools, thus excluding any child designated as "handicap grav" (directly translated as 'seriously handicapped') as well as those who had completed junior-secondary school and were required to continue their compulsory schooling in schools outside the district. At the beginning of the study both villages had schools with both primary and junior-secondary school departments. The school in village 'A' taught in Romanian whilst village B's school comprised two primary departments, one taught in Romanian and the other in Hungarian. Its junior-secondary department was taught in Romanian.

The participants in my study were 20 teachers, 13 parents, 13 children, 5 former pupils, 4 members of the county schools' inspectorate, and 4 members of the local administration. Participants came not only from the three officially designated ethnic groups but also from different cultural, socio-economic and educational backgrounds. Teachers of children in the community schools were ethnically Romanian or Hungarian, with most living in the nearest town to the district, travelling to school each day by bus. Only junior-secondary school teachers were required to be qualified at degree level. Primary school teachers may have completed their education when 15 years old, although most did have a higher qualification. Those involved in local administration lived locally and had varying levels of education and socio-economic backgrounds, whilst members of the schools' inspectorate all lived within easy reach of the County's main town and had a degree which enabled them to teach in junior-secondary or high school. Parents participating in the case study were ethnically Roma, whose educational backgrounds ranged from never having attended school to having completed, at most, eight years of school.

Data were collected over a two-year period towards the end of and following the ten-year strategy which was designed to improve access to education for Roma children. The methods of data collection were 103 classroom sessions, which were observed in all five school departments, using both qualitative and quantitative methods. Individual interviews were held with teachers, Roma parents, former Roma students and local and county administrators. Group interviews were held with Roma pupils. In addition, field notes were taken and documentary evidence collected. Data were analysed using thematic analysis with NVIVO 8/10 aiding the coding and categorising of data prior to the development of themes.

**Chapter 1** focuses on the broad context of Roma people in Europe and their history of being a minority culture in every country in which they lived, which led to centuries of discrimination. I also narrow the focus to the specific context of post-communist countries, particularly the Transylvanian region. The chapter also includes relevant literature relating to educational issues

that needed to be addressed, particularly in relation to poverty, discrimination and differences of culture, emphasising those particularly relevant to Roma as well to Romania.

**Chapter 2** discusses the context of Transylvania in relation to its different ethnic identities and educational traditions leading up to the issues, following democratisation, which led to the implementation of the 'policy'. It also includes the perceptions and practices of teachers and parents, before considering theoretical issues regarding policy design.

In **Chapter 3**, following theoretical definitions of 'education', 'quality education' and 'equal access', there is a consideration of some different understandings of the construct "equal access to quality education" and its relationship to the important concepts of 'integration' and 'inclusion', which were included in the Romanian Government's 'policy' statements.

**Chapter 4** considers research methodology, including reasons why I considered that a single case study was the optimal solution. I discuss the philosophical implications of my choice, and hence determine that an interpretive design was best suited to my needs. In addition to detailing methods of data collection and analysis, I also discuss the problems of studying a multi-cultural and multi-linguistic community as well as other important ethical issues.

**Chapters 5 and 6** provide the results and analysis of the first sub-question which related to perceptions of the 'policy', and the second sub-question which focused on current educational practices related to the 'policy'. **Chapter 7** discusses the findings of the previous two chapters, relating them to both theoretic and empirical issues raised in the earlier chapters.

**Chapter 8** gives the conclusions of the research, relating them to current concerns about Roma education. It also provides recommendations for research, policy making and policy implementation.

# CHAPTER 1. Roma in a European context

This chapter provides the relevant background that justified the need to improve school education for many so-called Roma in Europe. It first considers the use made of the label 'Roma' as a general term for what has been described as a 'mosaic' of small communities which, although different in many ways and frequently known by different names, nevertheless in much of the literature are seen to be connected. (Gheorghe and Acton, 2001; Liegeois, 2007a). I justify why, when and how I use the term 'Roma' as opposed to other nomenclatures. Following this, I discuss the usefulness of having broad estimates of the present-day Roma population and dispersion throughout Europe.

Next I extend back in time to discuss theories of the origins of Roma and how Roma in Europe have been described in historical accounts. This provides the background to an exploration of the diversity of influences, which may help explain both commonalities and differences in the present-day situation of many Roma. I argue that the interrelated issues of discrimination, poverty and the perception of a different but inferior culture by the majority throughout their history have been responsible for a disproportionate level of social exclusion for Roma throughout Europe, which in turn has had an adverse effect on the school education of Roma children.

For the purpose of this research, I define discrimination in the specific sense of the unfair treatment of a group or individual based on a specific perceived category, such as ethnicity, gender, or membership of a particular community. Thus, unless I specify otherwise, I use the term in its negative sense rather than in a neutral or positive sense. I also use the terms, defined by the Council of Europe, of 'indirect discrimination' when an apparently neutral practice puts one group of people at a disadvantage compared with others and 'direct discrimination' as the intent to discriminate against a person or group (CoE, 2003).

Another term that is used in this chapter is that of poverty. Definitions of what constitutes 'poverty' are the subjects of theoretical debate, although Jordan (1996) has classified them into two broad schools of thought. I adopt the first of these, which defines poverty in terms of wealth, whether in economic terms or as material resources. In the absence of an author's or participant's definition of poverty, I accept their use of the word 'poverty'.

Finally, culture is also used here. I use the definition of 'culture' that refers to the way of life of a group of people, which is distinct from other groups. This is the social meaning defined by Inglis (2005) and further refined by Storey (2007), who proposed that culture also envelops the meanings and values of a particular way of life and hence constructs its own realities.

I contend that discrimination, poverty and cultural differences from the majority population together with their consequences are issues that need to be addressed by any government policy whose goal is to provide equal access to quality education for Roma children. In order to explore these and other relevant issues, I discuss research literature which includes several studies not specifically related to Roma. Then I focus on the Roma population, using research from 20 European countries, with either an estimated proportion of Roma in the country exceeding 1%, included in multi-country studies, or else because the literature has identified other relevant issues relevant to Roma children. I complete the chapter by considering research that specifically relates to Romania. This section is not intended to demonstrate the extent of the challenges which need to be overcome, but rather to help identify them.

## 1.1. Establishing a unified identity known as 'Roma'

Fraser (2002) contended that there was no evidence that there was originally a single collective name for groups of people often referred to today as "Roma". However, in 1971 a World 'Roma' Congress was held in London with delegates comprising 'Roma' activists and elites from fourteen countries, mainly, but not exclusively, from Western Europe. Will Guy, who attended

the event, recounted that the Congress agreed to use 'Roma' as the term to describe all the peoples they wished to represent rather than other terms in common usage such as Gypsy, Sinti, Zigeuner, etc., which delegates felt were pejorative (Guy, 2001b). Although Sinti delegates accepted the use of 'Roma' to include their ethnic group, the name was later rejected by their subsequent delegation, who insisted on maintaining a totally separate identity (Acton and Klimova, 2001). Today, as well as Sinti, other groups, who may be considered as Roma by others have either rejected the name or else are not even aware of its existence (Bădescu *et al.*, 2007; Fleck and Rughiniș, 2008).

'Roma' was subsequently adopted by many 'non-Roma' as an umbrella term in academic literature, international and national policy statements and common parlance (Guy, 2001b; Liegeois, 2007a; Messing, 2014). Notwithstanding that 'Roma' is a contested term and the initial adoption of its use was made by a relatively small group of people who did not represent all the many, scattered communities they sought to define under a single exonym, it did have the advantage of drawing international attention to many groups of people who have been marginalised and discriminated against. Through the efforts of successive World Roma Congresses, those labelled by them as 'Roma' gained greater recognition by powerful international organisations such as the UN, the Council of Europe and the EU (Acton and Klimova, 2001). This recognition has resulted in people, described by the 'World Roma Congress' and others as 'Roma' being less likely to be ignored and to have a stronger political, if not representative, voice in Europe. Hence, I concur with McGarry's (2011) argument that, at the very least, using a single non-pejorative name has "highlighted the hardships, poverty, exclusion and discrimination – which most Roma endure" (p.284). However, either when devising policy or carrying out research, I propose that the use of the single exonym without further qualification is insufficient.

I also contend that only highlighting the discrimination of a disparate, even if connected, group of people ignores their heterogenous nature. While 'Roma' may be useful as an umbrella term, people described by this global

term should not be viewed as an unchanging, homogenous group of peoples or individuals. This was highlighted by a Romanian 'Roma' activist, Gheorghe (2013), who observed that:

> "the category 'Roma' is constructed by the very act of classification which gathers a wide range of different groups and individuals. Institutionalising this categorisation results in reifying fluid identities and varied characteristics" (p.82).

Messing (2014), in focusing on survey research about "Roma/Gypsy populations", also identified perceptual and methodological challenges for researchers, which arise from how they define the population for the purpose of their study. Definitions of Roma that perceived the people as a homogenous group, Messing (2014) argued, will have different meanings depending on context and also may change over time, possibly varying because of the "socio-economic situation and level of inclusion" (p.813). Furthermore, Messing (2014) contended that within groups defined as Roma, there may be people who identify themselves differently or who may reject the definition of Roma given to other groups who are included within this definition. Tremlett and McGarry (2013) gave examples from three different case studies of the latter situation. In one example, some Finnish Roma people rejected the name Roma used by a group of recent immigrants from Romania to define themselves and vice versa. On the one hand, the Finnish 'elite' Roma rejected that the name Roma should be ascribed to the immigrants who begged for a living, whilst the Romanian Roma rejected that the term Roma was used for those people who did not speak Roma language.

Important issues surrounding the alternative ways that Roma define themselves were also considered by Bhopal and Myers (2008) who, in their research in the UK, chose to use the nomenclatures that the people they wrote about preferred to use. The purpose of this, they recounted "may be seen as 'giving voice' to and legitimising the viewpoint of those who informed our research" (p.8). In later work of the above authors, depending on the specific research study, they have used names such as 'Gypsy' or 'Gypsies and Travellers'

(Bhopal and Myers, 2008, 2016), in each case explaining the usage of the terms that they selected. Fleck and Rughiniș (2008), in giving the results of a national survey and 36 separate qualitative studies in Romania, discovered that amongst those that had been identified as Roma, some preferred to call themselves Gypsies (țigani) rather than Roma or else used both names, while others chose not to recognise either term but instead preferred to use another term. This highlights the complexity of using a single term.

Other issues, raised by Messing (2014) that needed to be addressed by researchers were not only the need for clarity about how those in research studies identified Roma and whether it was by self-identification or by other means, but also that the context and purpose of the research were made clear; these decisions, she argued, had consequences for research outcomes. My research focused on a policy which was driven by EU accession requirements for those the EU described as Roma (EC, 2003), which also included the need to consider relevant UN human rights conventions regarding minorities and children. Hence, I consider that it is also appropriate for me to use the term Roma when considering the broad issues in this chapter which inform my research. At the same time, I recognise and respect the fact that other terms will be used by writers and participants of my research and will adopt their usage in quotations. When conducting my research of a Transylvanian community, however, I ensured that the definition of Roma that I used for the study was made clear.

## 1.1.1. Estimated population and distribution of Roma in Europe

In order for governments or international organisations to formulate policies to improve the situation of Roma, an estimation of the size and dispersion of the target population is relevant. Such estimates have informed EU policy, in particular with respect to complying with membership requirements for countries applying since 1993 (Pusca, 2012a). From 1993, all applicant countries needed to sign the Copenhagen Agreement, formulated by the EC, which

established a set of criteria for applicant countries wishing to join the EU. Within the criteria was the stipulation that applicants must have a policy, enshrined in law, to improve the situation of Roma in their country, including the education of Roma children (EC, 2003; Pusca, 2012a).

The Council of Europe (CoE, 2014), gave an average estimated population of 11.3 million Roma, dispersed throughout virtually every country in Europe; see Figure 1.1. This estimated population is greater than the combined population of Denmark and Norway (see Appendix 1). Kovats (2002), however, stated that there are wide variations in the estimated sizes of Roma populations because there is no consistent method of assessment, hence suggesting that Council of Europe figures can "most charitably be described as educated guesses" (2002, p.2). Revenga, Ringold and Martin (2002) highlighted some problems by looking at three sampling methods to assess population. Each yielded a different result. One problem was the different ways of categorising who were Roma such as by self-identification, by outsiders or census figures. They suggested that underestimates were made because some Roma may not wish to be identified or else may not have official identity papers. On the other hand, as Revenga *et al*. (2002) argued, "local experts" may wish to make high estimates of Roma living within their area "to highlight the issue for policy reasons" (p.7). There are also difficulties when countries such as Hungary do not allow identification by ethnicity in official documents (Save the Children, 2001c). By taking the mean of estimates obtained from a variety of sources, I contend that, to some extent, this counteracts biases caused by both overestimates and underestimates. However, as can be seen in Appendix 1, the CoE mean value was only constructed by finding the mean between the lowest and highest estimates given in the table without including the relevant information on when and how such estimates were made.

Using the CoE estimates, prior to the 1993 Copenhagen agreement, an estimated 750,000 Roma lived in Spain, which represented 62% of the total estimate of Roma living in the EU at the time. After the inclusion of former

communist countries, according to the estimates, by 2013, Spain's Roma represented only 12% of EU's Roma population. Therefore, the inclusion of some former communist countries in the EU meant that the estimated population of Roma rose by more than four million CoE (2014), with a proportion of Roma in Bulgaria (10%), Slovakia (9%) and Romania (8%), compared with Spain (1.6%). Present-day applicant countries, which include Turkey, represent a further estimated 5 million Roma. CoE (2014) noted that these countries needed to "step up their efforts to integrate their Roma population". Notwithstanding all the problems regarding the accuracy of the CoE findings, they did strongly suggest in terms of the EU, that there would be a vast increase in the numbers of Roma in a new enlarged EU following acceptance of new members from former communist countries. This I propose, as Pusca (2012a) and Matras (2013) also contended, was instrumental in the EU requirement to sign the Copenhagen agreement so that new members of the EU with large populations of Roma people addressed the issues of Roma poverty and other disadvantages within their own country rather than having them 'transported' to other wealthier countries of the EU through mass migration.

The map I have drawn up in Figure 1.1 is based on the mean value of CoE, (2014), published estimates, (see appendix 1), and illustrates an approximate comparison of both population (illustrated as red cuboids) and proportion of the whole population (shading of countries) in countries of Europe. This visual comparison further demonstrates that the countries of Central and Eastern Europe (CEE), who were applicant members of the EU prior to the Copenhagen Agreement, generally have the greatest proportion of Roma relative to the total population of their country and with the exception of Turkey, the greater actual numbers of Roma per country. By contrast, all formerly existing members of the EU, apart from Spain, showed a proportion of Roma of 1% or less of their respective populations.

According to the official census figures, in Romania, a country with a comparatively high population of Roma, the Transylvanian region had the

highest proportion of Roma compared with non-Roma (CEDIME-SE, 2001). Therefore, I considered that this region of Romania, together with my pre-existing knowledge of the area, was an appropriate place to conduct my case study.

**Table 1.1.** *Key to EU and Candidate counties ilustrated in Figure 1.1*

| Key No. | Country | Year joined EU | Est. Roma pop. | Key No. | Country | Year joined EU | Est. Roma pop. |
|---|---|---|---|---|---|---|---|
| 1 | Belgium | 1958 | 30,000 | 15 | Sweden | 1995 | 50,000 |
| 2 | France | 1958 | 400,000 | (16) | Cyprus | 2004 | 1,250 |
| 3 | Germany | 1958 | 105,000 | (17) | Malta | 2004 | 0 |
| 4 | Italy | 1958 | 150,000 | 18 | Bulgaria | 2007 | 750,000 |
| 5 | Luxenbourg | 1958 | 300 | 19 | Croatia | 2013 | 35,000 |
| 6 | Netherlands | 1958 | 40,000 | 20 | Czech R | 2004 | 200,000 |
| 7 | Denmark | 1973 | 2,500 | 21 | Estonia | 2004 | 1,050 |
| 8 | Ireland | 1973 | 37,500 | 22 | Hungary | 2004 | 750,000 |
| 9 | U.K. | 1973 | 225,000 | 23 | Latvia | 2004 | 12,500 |
| 10 | Greece | 1981 | 175,000 | 24 | Lithuania | 2004 | 3,000 |
| 11 | Portugal | 1986 | 52,000 | 25 | Poland | 2004 | 32,500 |
| 12 | Spain | 1986 | 750,000 | 26 | Romania | 2007 | 1,850,000 |
| 13 | Austria | 1995 | 35,000 | 27 | Slovakia | 2004 | 490,000 |
| 14 | Finland | 1995 | 11,000 | 28 | Slovenia | 2004 | 8,500 |
| **Candidate Countries who have applied** | | | | **Potential candidates** | | | |
| 29 | Albania | 2014 | 115,000 | 30 | Bosnia & Herzegovina | 2016 | 58,000 |
| 32 | Macedonia | 2005 | 197,000 | 31 | Kosovo -not yet but likely in future | | 37,500 |
| 33 | Montenegro | 2010 | 20,000 | | | | |
| 34 | Serbia | 2014 | 600,000 | | | | |
| 35 | Turkey | 1999 | 2,750,000 | | | | |

*info from ec.europa.eu/environment/enlarg/candidates.htm (accessed 23/07/17)*
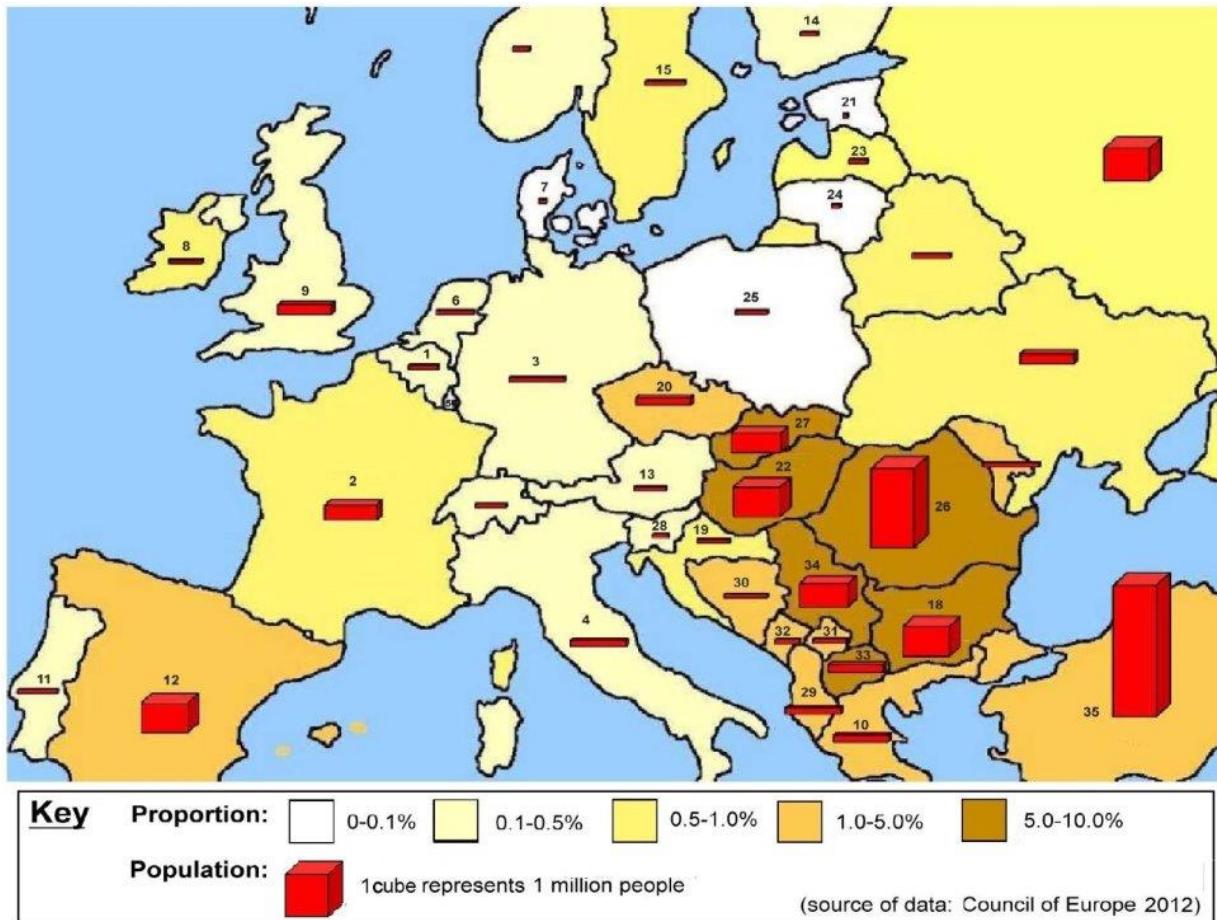
**Figure 1.1.** *Estimated Roma population in each country (shaded) and proportion of Roma to the population by the country(3D block)*

## 1.2. Origins of Roma

There is no recorded history that Roma ever existed as a single community with a definable territory in Europe or elsewhere (Achim, 1998; Matras, 2002). Therefore, alternative discourses exist, arguing either that today's Roma population descended from groups of people originating from India who arrived in SE Europe augmented by indigenous populations as groups travelled to and within Europe (Hancock, 2010b; Moorjani *et al.*, 2013) or alternatively that supposed links with India are either unfounded or irrelevant to Roma and their present-day situation (Belton, 2005; Okely, 2011).

Evidence exists from linguists that Roma are connected by a language that has some Indic roots (Gresham *et al.*, 2001; Hancock, 2002, 2010b; Matras, 2002) even though the language may take on different forms or dialects and today is no longer spoken by all Roma. The linguists cited above also concluded that the language included words with Greek, Slavic and other linguistic roots, which could indicate a westward migration of Roma from India through SE Europe and then a dispersion throughout Europe. Recent genetic research in several countries has further substantiated Indic links by concluding that small groups of Roma originated from India, probably travelling through Asia Minor, initially arriving in SE Europe. Kalaydjiveva *et. al.* (2005), for example, contended that results from genetic research not only gave unambiguous proof of an Indian ancestry but also that there is a "strong evidence of the common descent of all Gypsies regardless of declared group identity, country of residence and rules of endogamy" (2005, p.1086). Later genetic research (Gusmao *et al.*, 2010; Pamjav *et al.*, 2011) has added weight to the above contention, with further studies such as Moorjani *et al.* (2013), concurring that the migration into Europe occurred approximately around the mid-12th century with a drift over centuries from East to West, thus broadly supporting the indications given by linguistic research. However, Bakker (2012), provided a cautionary note with regard to the genetic evidence, suggesting that there were several methodological

problems, in particular the methods of sampling used by geneticists both in the inconsistency of the terms used to describe different Roma communities in different areas of Europe, and also that some research was not carried out independently of linguistic findings. However, Kalaydjiveva *et al.* (2005) referred to a large volume of genetic studies which was not initiated to confirm linguistic findings but to identify medical problems that have been identified particularly in Roma, Indian and Pakistani people. Therefore, I conclude that the genetic combined with linguistic evidence is overwhelming in suggesting that today's Roma population descended from a group of people with Indic roots who have been augmented by indigenous populations in the areas which they either travelled through or settled in.

Okely (1983, 2011), on the other hand, has argued against the contention that Roma originated from the Indian sub-continent. Following her anthropological studies of English 'Gypsies' and discussions with other anthropologists from several West European countries, she concluded that an Indic origin was a myth, not even making reference to the body of genetic evidence available by the time she wrote the later work published in 2011. Rather, she proposed that the adoption of Indic origins could be a strategy to create international solidarity among Roma. Regarding linguistic findings, she proposed that the use of a language with some Indic roots amongst Roma people was because this language had been adopted from merchants or other travelling groups from India.

Furthermore, Okely (1983) argued that in England, of necessity, English must have been their first language rather than Roma language. Extrapolating her view to Roma living in other countries would suggest that Roma from these countries also must have been in contact with traders from India in the past, including, for example, those in Romania who Achim (1998) contended were enslaved from the beginning of their presence in the country. She also contended that the first language of each Roma community must have been the language of the dominant culture where they lived. Okely (1983) justified this by contending that Roma only existed through their connection with other

cultures for which they provided goods or services. On the other hand, Okely (1983) contended that to be a 'Gypsy' there needed to be a clear bloodline through at least one parent, and that people who had no such blood connection could not become a 'Gypsy', thus acknowledging a generational link, also referring to Roma in England and other European countries as an ethnic group. She also acknowledged that there were many similarities of culture between Roma living in different countries.

I contend that Okely's (1983, 2011) arguments that any connection between the origins of Roma and India is a myth are seriously flawed. On the one hand Kalaydjiveva *et al.* (2005) and other large bodies of genetic literature cited above provided evidence which related to Roma living in different present-day countries of Europe. On the other hand, Okely (1983, 2011) provided no evidence to support her explanation that their language was later adopted by Roma from merchants or other travelling groups as a second language.

Belton (2005) agreed with Okely's argument regarding Indic origins, however he argued that race, ethnicity and culture are social constructs, and that Roma are people who assume the identity of an oppressed group as opposed to being an ethnic group. Belton (2005) contended that Roma are made up of a "melding" of different groups from diverse backgrounds despite traditional theories seeking "to differentiate people in terms of a typology based on custom, tradition, ethnicity or race" (p.172). Belton (2010) also stated that "this search for affinity also necessarily entails identification of the "other",, which he considered led to discrimination and prejudice (p.45).

Acton (2010a) considered the alternative theories of Roma origins that have been accepted over the different centuries, contending that all theories have to an extent been constructed. Whilst accepting that at least some Roma originated in India, he argued that this did not on its own make sense of their history, and also that Roma history has been different in different parts of Europe. However, Acton (2010a) proposed that "our understanding of Roma is linked to their history" (p.23). I also concur that it has been the

perception throughout history of non-Roma towards those perceived as Roma that has shaped their history in Europe, whether the perception was based on racial, ethnic, cultural or other social differences. Therefore, contrary to Belton (2010) above, in accepting an original Indic connection and consequent historical differences in language from the surrounding majority cultures, I argue that these factors initially set Roma people apart, leading to discrimination, which in turn has affected Roma culture. That Roma culture has been affected by the way people viewed them over history is exemplified by Acton's (2010a) contention that "culture does not explain genocide; genocide explains culture" (p.21).

## 1.3. History of Roma in Europe

There is no definitive and universally accepted written history of Roma people in Europe, nor can a review of literature on this topic be anything other than selective because it relies only on the survival of documents and word-of-mouth accounts which cannot be verified (Liegeois, 2007a; McGarry, 2010). Documents which relate to policy statements or official decrees also may not have any supporting evidence to suggest whether or not they were successfully implemented. Collis (2010), in researching Celtic history, has found that even documentary 'evidence' is sometimes contradictory (p.25). Hancock (2010a) further contended that some accounts of Roma culture have been either faked or are misinformed yet have been repeatedly recorded as statements of fact in subsequent literature, arguing that "Romani Studies has lent itself easily to scholarly fabrication and the literature is replete with it" (p.186). As my purpose is to inform the research study, this history of Roma in Europe also needs to be selective, with its greatest focus on EU countries in CEE which not only have the greatest population of Roma but are also where a policy of 'equal access to quality education for Roma' has been principally targeted, as I have argued above. I will also argue that historically, policies in CEE have evolved in different ways from those in western Europe (Achim, 1998; Liegeois, 2007a; Barany, 2012). As I am not a historian, in the following

sections, I am especially cautious about how I interpret differing and possibly contradictory accounts given in the following sections, and I avoid giving any weight to those which are assumed to have veracity because there are multiple references in literature.

## 1.3.1. Prior to the twentieth century

Many differently sourced references in literature have been made, that refer to distinctive groups or communities of people, dispersed across Europe, who have shared variations of a common language that differed from the majority language spoken by those within the region they inhabited. Some accounts also refer to a similarity of dress, a dark-skinned appearance and culture which also appeared to link these people together (Shahar, 2007; Liegeois, 2007a; McGarry, 2010; Hancock, 2010a).

Achim (1998), a Romanian historian, concluded from documentary evidence that an early migration of Roma arrived in the Byzantine Empire in the middle of the eleventh century, first reaching Thrace (part of modern-day Europe) early in the fourteenth century, with some heading towards Greece and others to the Balkan Peninsula. His conclusions suggested a later entry into Europe than that proposed by genetic evidence but this could be because groups of Roma had lived in SE Europe for at least two centuries before the documents referred to by Achim (1998) existed. Should this be the case, I propose it indicated that Roma had a settled existence in Europe before some groups dispersed in a more westerly and northerly direction. Achim (1998) proposed that many Roma people who initially migrated from Asia Minor to modern day Turkey and from there to the Balkans and Hungary settled in all these areas; this, I suggest, is also reflected in modern day European population estimates (see Appendix 1).

Achim (1998) proposed that the dispersion of Roma communities throughout Europe was a gradual process from the fourteenth century onwards, thus providing Roma with different histories. Achim (1998) commented that:

"what unites all these histories is the Gypsies' extraordinary ability to conserve their cultural identity and their obstinate refusal to adapt to the values of European civilization and to give in to assimilation" (p.65).

Shahar (2007), a specialist of early modern European history, analysed the various perceptions of Roma as a "distinct group", "an ethnic group" and other attitudes which considered them to be "a rabble of mixed national origins" (p.2). In Shahar's (2007) analysis, she cited written accounts about groups of Roma arriving in different areas of West Europe, in the early fifteenth century, variously described as a "people", a "large crowd of alien vagabonds", "ugly people whose skin was burned black by the sun, wearing filthy clothes", "the nation of gypsies (*Ciganorum*)", or "a useless people known as gypsies" (pp.5–6). Both Achim (1998) and Shahar (2007) proposed that Roma generally held a marginal and inferior position in society.

McGarry (2010), although not a historian, cited accounts of historians when he described attitudes towards Roma people prior to the nineteenth century. He recounted that, when travelling across Europe in the fourteenth or fifteenth centuries, groups of Roma were at first tolerated because they introduced themselves as Christian pilgrims and were treated as a curiosity through having dark skin and hair and wearing colourful clothes. However, the authorities became suspicious of them and so "repressive legislation and persecution soon followed" (McGarry, 2010, p.12). McGarry (2010) further recounted that, during the sixteenth century, Roma were "banished from almost every European state", thus being treated as vagabonds rather than being seen as a separate ethnic identity (pp. 15–16). He also considered that it was likely that Roma migrants in the sixteenth century who arrived in Britain encountered existing 'Travellers', who may not have originated from India, but who were treated in a similar and discriminatory way as Roma by the settled British majority, who made no distinction between them.

Liegeois (1998) also referred to policies of exclusion and persecution in some countries, giving specific examples of France during the sixteenth century, when Louis XII banished "gypsies", with the penalty for "defying

the ban" being "death by hanging" (p.37), and giving similar examples of banishment on pain of death in Germany, Prussia, Switzerland, Italy and Sweden. When these peoples were banished, unlike other groups they had no country of their own to return to; therefore, I consider that it was probable that they were forced to travel to another country where they could hope for a better reception. In Spain, it was reported that Roma did have a choice of assimilation or leaving the country. Ringold *et al*. (2005) proposed that many Roma decided to settle in Spain and yet attempted to keep their traditional culture; however, Matras (2013) reported that over the last two centuries Roma living in Spain have changed from speaking their language to speaking that of the majority.

Achim (1998) contended that, in East Europe, Roma settled as opposed to either travelling by choice or being banished; instead they were treated as part of the "servile and inferior class" (p.64), and later became enslaved. This at first sight contradicts McGarry's (2010) assertion, given above, that in most European states Roma were banished. As McGarry (2010) did not enumerate all the states to which he referred, I argue that both statements are compatible, provided that McGarry (2010) viewed 'East Europe' as consisting of only a small minority of countries in Europe.

The above accounts of the early presence of Roma in Europe give evidence that Roma were distinctive groups, separated by a distinctive culture from the majority dominant cultures of Europe, and linked by being discriminated against by the different ruling polities and by speaking a different language. However, their experiences of discrimination were not identical; for example, some were enslaved and lived in one place for centuries, others were banished and moved from country to country, whether or not their lifestyle was nomadic, and, according to Ringold *et al*.'s (2005) proposal, others chose to settle in Spain rather than be banished yet attempted to keep their culture. I contend that such different histories of discrimination would have impacted on their culture, which although remaining distinct, would have developed in different ways.

During the nineteenth century, the Austro-Hungarian Empire not only covered modern day Austria and Hungary, but also Croatia, Slovenia, Czech Republic, Slovakia, parts of Poland, Italy and Ukraine as well as the Transylvanian region of Romania (Magocsi, 2002). The Austro-Hungarian rulers had a policy to 'civilise the Gypsies' (Achim, 1998) by forcing Roma communities to live in small groups of only two or three families in fixed dwellings on the outskirts of other villages, requiring them to abandon their own language and culture in favour of that of the new locality. This, however, according to Achim (1998), was applied with only limited success.

At the same time in the neighbouring principalities of Wallachia and Moldovia, (the majority of present-day Romania), Roma were still enslaved. Achim (1998) related that even in the first documents, which were written several centuries earlier, Roma were referred to as being part of the possessions of monasteries. Achim (1998) furthermore suggested that although he knew of no documentary evidence, other countries such as Bulgaria and Serbia in South-Eastern Europe also may have enslaved Roma people. The abolition of slavery in Wallachia and Moldovia was realised around the middle of the nineteenth century by a series of laws, with about a quarter of a million Roma people being released from slavery.

From these early reports of Roma living in Europe, their culture has been variously described either as settled or else as a people who travelled. Liegeios (1998) assumed that Roma travelled by choice, joining up with other people for whom travelling was a way of life. He asserted that nomadism was, and still is, an essential component of Roma culture both for social and economic reasons. Liegeios (1998) also contended that being held as slaves was the reason that some Roma did not travel, but he accepted that the motivation for travelling was diverse and did include expulsion from countries as well as social or commercial reasons. However, he opposed the idea that Roma were ever settled, instead asserting that there exists a "*structural* nomadism" and a "*reactive* nomadism" but that all Roma have in common nomadism because they are detached from their surroundings and can leave whenever

they wish. Thus, Liegeios (1998) criticised the notion of 'sedentarism', which "imposed a notion of permanence on a people for who sedentarism is only a phase while they wait for better days or new opportunities" (p53).

Although Liegeios (2007a) later distinguished between Roma and Travellers, thus acknowledging that all Travellers are not Roma, he combined the travelling nature of both in terms of it being an essential part of their culture. I suggest, therefore, that Liegeios (2007a) implied that some elements of Roma culture are fixed, unlike Acton (2010b) who argued that Roma culture is a response to changing circumstances. Contrary to Liegeois' (2007) contention, for more than two decades, in Romania I have had personal experience of meeting both individuals and groups of Roma whose families have lived by choice in settled communities for generations even though they were experiencing extreme hardship. Although some individuals or families of Roma that I know have travelled outside the country for occupational reasons, many return to the house they consider to be their home. This, I consider, is no different from non-Roma in Romania. For example, I know personally teachers from Transylvania who have gone to Italy during their summer break in order to supplement their income, as well as other people who have left 'home' for a short period of time, working as economic migrants in order to acquire capital to improve their lifestyle on their return to live in the place they consider to be their home. I contend, therefore, that the ascription of an unchanging culture of travel as a way to define Roma people ignores either the evidence of Roma who have lived in the same fixed community for generations or the possibility that migration either for social or economic reasons may not be any more specific to Roma communities than others living in the same country.

Records of pre-twentieth century history, however, do indicate that throughout Europe many, if not all, Roma people were marginalised and considered inferior as proposed by Achim (1998) and Shahar (2007).

## 1.3.2. Policies of assimilation, and persecution during the twentieth century

During the twentieth century, whilst there has been no further evidence of Roma being enslaved and, according to Achim (1998), the assimilation policies of the Austro-Hungarian Empire had only limited success, Roma had to face a new and devastating policy of annihilation. With the rise of Nazism in the 1930s, Roma, like the Jews, were considered to be racially inferior. McGarry (2010) argued that Roma were seen as a distinct race, referring to recorded evidence of them being sent to camps where, in some cases, they had to wear a brown triangle and the letter Z for Zigeuner (Gypsy) on their arm bands. The first concentration camp set up for Roma was in 1935 (Barsony and Daroczi, 2008). Following this event, Barsony and Daroczi (2008) recounted that many Roma people from countries under German influence were sent to concentration camps; up to half a million Roma became victims of the Holocaust, also known as 'Pharrajimos', with many dying, being sterilised or otherwise mutilated by medical experimentation. In Spain at this time Roma were also "openly discriminated against", were forbidden to speak their language and were classified by the paramilitary national police force of Spain, as "a dangerous group of people" (Ringold *et al.* 2005, p.156).

At the same time, in what was the nation state of Romania, some Roma people were deported to Transnistria in a region to the east of Romania, instead of being sent to concentrations camps. Roma were forced to leave all their possessions and means of livelihood behind. In Transnistria, the living conditions were "very harsh" and it was also reported that tens of thousands died of hunger, cold and disease (Achim 1998). By no means all Roma were treated this way in Romania because some were permitted to join the army. Achim (1998), therefore, contended that the attitude in Romania differed from that of Germany and its occupied territories. The region of Transylvanian at this time was split between Hungary and Romania; hence in the Hungarian part, Roma were sent to concentration camps, whilst some Roma who lived in the Romanian part were sent to Transnistria.

The personal experiences of Roma people from the Nazi period was documented through narrative accounts. I consider this to be important because, to my knowledge, prior to the twentieth century Roma history had not been recorded by Roma people's own experiences. Stewart (2011a) for example provided a moving narrative of survivor who had been sterilised, who said that:

> "they destroyed our whole life, the love, the families, the cohesion. We don't have families anymore… They took everything, the trust in others, the openness and the warm feelings, they are all destroyed" (p.172).

Barsony and Darocsi (2008) also provide oral narratives of twenty survivors. Such narratives, however, I contend can only give some ideas of how the survivors of the Holocaust, may have been affected by it. Opposing views have been written in literature of how their memories have affected Roma people today. Hancock (2010c) suggested that "our people are traditionally not disposed to keep alive the terrible memories from history" (2010c, p.225). This suggestion, however, was refuted by Iulius Rostaș (CEDIME-SE, 2001), who claimed that:

> "being marginalized and oppressed, subject of forced assimilation and discrimination for centuries, the Roma have developed their own strategy of survival which differentiates them from the non-Roma. The experience of Porrajmos – the equivalent of Holocaust in Romani language – has given to the Roma a sense of belonging to the same community everywhere they live" (pp.15–16).

It is impossible to know from the personal views expressed above the extent to which this period affected the views of Roma people. I propose however, that the effects would not be uniform because different Roma communities were affected in different ways.

The Nazi period had a profound and lasting effect on how Roma people were treated, even following the defeat of Germany. Negative and racist perceptions about Roma, promoted by the Nazi regime but remaining years after its overthrow, have been recorded in literature, either in legal documents or in research into present day attitudes. For example, in Austria, Roma

people were not acknowledged as victims of the Holocaust by the Austrian Government, as demonstrated by a 1952 memorandum from their Ministry of Interior Affairs, which described a wartime camp as a place for "social advancement" for Roma even though they were "massed by hundreds in a few barracks [and]... continuously exposed to mistreatment" (Leoni, 2004, p.20). As late as 1964, victim assistance was denied to Roma in Austria on the basis of an earlier statement issued by the Nazi authorities which stated "only anti-social gypsies were arrested and deported" (Leoni, 2004, p.20). Such actions, I contend, would have had a devasting impact on the poverty of Roma people.

An example of attitudes sympathetic with the Nazi approach towards Roma has been demonstrated much later in Romania, in a study carried out by Chircu and Neagreanu (2010), which used a survey of 50 teachers and 50 university students, enrolled in a pre-service teaching programme, where they were asked whether or not they agreed with a number of statements regarding national minorities. The statements included "Maybe Hitler was a little extreme, but in general his ideas were good" and "Some people are less developed than others and should be led by a superior people" (Chircu and Negreanu, 2010). For the question about Hitler's ideas, 15% of teachers and 50% of students agreed with the statement, while for the second, 30% of teachers and 40% of students agreed. Although this was a limited survey it could indicate that such views are held today by some teachers.

The experiences of Roma in this historical period, I propose, further cemented the discrimination, alienation and comparative poverty of Roma people that was established in earlier centuries. Shortly after the fall of the Nazi regime, with the subsequent end of World War II, Europe was broadly divided up into Western Europe, made up of democratic and independent countries and CEE which came under Soviet communist style rule.

## 1.3.3. Post-War Soviet Bloc Countries

Shimoniak (1970), a historian who lived in communist Ukraine, argued that the general principles of Soviet-style communism were that everyone should work for the benefit of the state and that an individual's character should be developed, not by the family but on the model of "state morality" (p.208). Hancock (2010a) also described Soviet-style philosophy as placing the "state above the individual" (p.265). Shimoniak (1970) proposed that school education was particularly important because it was the way to instil this ideology. All children, including Roma, were compelled to attend school for this reason. McGarry and Agarin (2012) contended that schooling was also needed to ensure that the state trained an effective workforce. In sending Roma children to school, the state could ensure that they "would become another cog in the state machine, no different from any other citizen" (McGarry and Agarin, 2012, p.25). Changes in educational policies at this time, therefore I suggest, were not specifically directed at the Roma population but were part of a whole state social policy that meant the state needed to produce many workers for unskilled jobs such as work in factories and on farms. Ringold *et al*. (2005) provided evidence that, in several countries under Soviet domination, Roma children were frequently placed in 'special schools' or 'special classes' for those described as retarded or difficult, and because of the low levels of education achieved by Roma they were employed in the "most onerous, unskilled positions" (p.8). Achim (1998) similarly observed that in Romania, although everyone was guaranteed work, usually Roma "were forced to perform unskilled and poorly paid work in the factories in towns and in the country huge agricultural establishments" (p.194). Hence, I consider, many Roma citizens continued to have a low status and a low income compared with the non-Roma majority.

Barany (2012), however, contended that the Soviet system of education did not have negative effects for all Roma. Some Roma managed to succeed and become well educated. Barany (2012) proposed that:

"paradoxically, through their social (especially) educational policies the socialist regimes contributed to the development of what they feared most: Romani identity formation and activism" (p.44).

Gheorghe (2013) also argued that CEE Roma during this time were better educated than their Western European counterparts and hence were more effective in making international organisations aware of their problems.

Both Shimoniak (1970) and Barany (2012) provided evidence to show that the states under Soviet domination interpreted the philosophy differently, including both their attitudes towards and also their treatment of Roma. Policies ranged from Roma being encouraged to lose their distinctive group identity by being dispersed throughout the country, forced to lead a sedentary lifestyle and not permitted to speak their language, to the multi-cultural approach in Yugoslavia which permitted different groups to live together in harmony. Only in 1970, the Hungarian Social Worker's Party "realized that its policies should take into account the Gypsies' unique ethnic identity and specific socio-economic problems" (Barany, 2012, p.34). What was common was that each country recognised Roma as distinctive from the majority population; hence, I propose that a cultural difference from the majority, whether or not they were considered as separate racial or ethnic groups, was recognised by the authorities at this time.

Planned programmes for the social integration of Roma, however, did not always work as the different regimes had hoped (Guy, 2001b; Ringold *et al.*, 2005; Barany, 2012). In Romania, Anăstăsoaie (2003) referred to a 1983 report of the Romanian Propaganda Section of the Party's Central Committee, which recognised that the social integration policy for Roma had not been totally successful. The report blamed "their backward mentality" and their negative attitude towards work (Anăstăsoaie, 2003, p.273). Thus, as late as 1983, but when Romania was still a communist state, an official report blamed Roma for the state's lack of success, using highly discriminatory language. Less than two decades later, when Romania conformed to the EU

requirement, I propose that such views may still have remained in some quarters of the population.

Ringold *et al.* (2005), whilst recognising that Soviet policy was applied differently in different countries, nevertheless concluded that, in general, the policies improved conditions for Roma by providing housing, employment and education. However, they reported that this had 'mixed blessings'; although everyone was guaranteed a paid job, the jobs allocated for many Roma were predominantly in out-of-date factories or large state farms

## 1.3.4. Democratic Europe

Ringold *et al.* (2005) contended that post-communist restructuring involved closure of factories and privatisation of state farms which, according to Guy (2001a) "soon turned substantial Roma employment levels into almost universal unemployment" (p.13). Hence, Guy (2001a) proposed that most Roma were forced to survive on whatever state benefits existed, although "many [Roma] were deemed ineligible" (p.14) and that eligibility depended on having correct identification papers. It has also been reported that, even in this century, not all Roma have these (EUMAP, 2007a). Ringold *et al.* (2005) also suggested that the need to rely on state benefits not only meant that Roma were amongst the poorest in society but also led to resentment amongst non-Roma, who blamed Roma for being "burdens on the state" (p.13). Mass unemployment and consequent poverty, together with the numbers of Roma in CEE which led to the fear of a vast influx of Roma migration to West Europe were also considered to be major contributory factors to the EU's accession requirement that applicant countries must improve the situation of Roma (Liegeois, 2007a; Pusca, 2012a).

Poverty in democratic Europe was not only limited to former communist states, however, as shown by a major survey conducted by the European Union Agency for Fundamental Rights (Hancock, 2010b; FRA, 2012). This report contained a statistical study of economic poverty covering eleven

European EU nations, which included five western European countries as well as six former communist states (FRA, 2012). Results showed that in all eleven countries those living in Roma households had a greater risk of poverty, with the highest level (in relation to the non-Roma population of their country as a whole) reported in Portugal, Italy and France. In answer to the question if someone in their household "went to bed hungry in the past month because there was not enough money to buy food", the study found the proportions of Roma answering yes to this question were higher compared with non-Roma in every country.

I consider that the above account of Roma history since their recorded presence in Europe, provides evidence that many Roma lived in distinctive communities and were generally considered inferior to the majority population. There has been no evidence, to my knowledge, that has suggested that Roma communities were ever autonomous within the polity of the region they inhabited, hence although being distinctive in many ways, Roma have always been subjected to laws made by different non-Roma authorities. Moreover, as well as the distinctions that have been made by non-Roma regarding Roma, linguistic evidence also exists that many Roma communities throughout Europe used a similar sounding word to distinguish all Roma from non-Roma (Matras, 2002; Hancock,2010b). In Romania, for example, I learnt from Roma acquaintances that non-Roma are all known as gagiu (pronounced gajiu) whether or not Roma language is spoken. This bears a striking resemblance to 'gorgio', a term which is used by English Roma (Okely, 1983), and other terms cited by linguists Matras (2002) and Hancock (2010b) who agreed that a particular feature of Roma culture was the similar word used by many Roma to distinguish non-Roma from Roma. I suggest, therefore, that the combined historic and linguistic evidence adds weight to Gheorghe and Acton's (2001) assertion of Roma being a mosaic of small but connected groups.

## 1.4. Educational challenges in democratic Europe

In 1967, the Plowden Report (1967) was commissioned to review all aspects of primary school education in England. This report noted that "gypsies" were "probably" the most severely deprived children in the country, suggesting that most did not attend school and that the "potential abilities of those who do are stunted…they tend to be excluded by their way of life" (p.595). Whilst the Plowden report directly related to Roma who lived in mobile caravan sites, two decades later, surveys regarding the school provision of 'Gypsies' were synthesised and compiled in a report for the EC by Liegeios (1998). This latter report combined the results from the different surveys of Roma schooling, which had been provided by the 10 EU countries which were members when the report was commissioned. The report covered both travelling and settled Roma. The summary of the combined surveys showed that many Roma children never attended school, the basic literacy of those who did was comparatively poor and the majority of their parents were illiterate. Discrimination by teachers as well as their lack of respect for cultural difference were reported by Liegeios (1998), whilst parents felt rejected and distrusted school. Liegeios (1998) concluded that, at the time of writing, "as things stand, 'Gypsies and Travellers' do not accept school any more than school accepts them, nor respect it any more than it respects them" (p256).

The above reports, I contend, signify that a combination of discrimination, poverty and differences in culture were factors that led to the need for a specific policy for equal access to education for Roma. Therefore, the next section explores how these and other issues have led to barriers to education which, I suggest, provided challenges that needed to be addressed by policy makers. The surveys I discuss are intended, for example, to "test conjectures about the reasons why some children make more progress in school than others" (Plowden, 1967, p.187), whilst qualitative research has been able to explore the issues in more depth from the point of view of stakeholders such as parents, teachers and children.

## 1.4.1. Challenges to education faced by parents and pupils

I found that research reports in this sub-section provided a valuable insight into the challenges that might be faced by parents and pupils, although the research did not relate directly to Roma children.

The English Plowden National Survey (Plowden, 1967), which used school attainment as an indicator of barriers to education, concluded that more of the variation in educational attainment was "caused" by parental attitudes than either the variation in "home circumstances" or in "schools" (p.181). The focus on parental attitudes in the survey's design suggested to me that this aspect, rather than the school's attitudes to parents, was considered to be a causal factor in attainment. Hence, I propose, that whilst the Plowden National Survey was a useful starting point, the focus on parental attitudes to school without also considering teachers' attitudes towards them and their children was a limiting factor. This, I propose, was particularly relevant for Roma education, when considering the country surveys compiled by Liegeios (1998), which referred to the discrimination of schools towards Roma parents as well as the parents' distrust of schools. However, the Plowden, (1967) survey did report that the number of meetings with parents organised by the school had a positive effect on a child's success.

Hartas (2012) and Reay (2006) both proposed an alternative view of parental attitudes towards school to that of Plowden (1967). Hartas (2012), who used data from the 'population-based representative sample' of over 9,000 seven-year-old children from the UK Millennium Cohort Study, as detailed in Hansen (2008), included socio-economic factors in her analysis. She proposed that her results indicated that it was the level of education of the mother, together with family socio-economic factors, which were associated with levels of school attainment (measured by teacher rated assessments of skills in speaking, listening, reading and writing). Hartas (2012) concluded that those mothers whose family income was in the lowest 20% of the sample were equally

likely to have positive attitudes to the education of their children as those with higher family incomes; however:

> "due to structural inequality, [mothers] were likely to differ in opportunities to possess intellectual and cultural capital required for capability building to make home learning effective and reduce the achievement gap" (p.876).

Reay's (2006) qualitative research of two contrasting primary schools in the UK considered the challenges faced by mothers, including those of a different cultural background than the majority. Reay (2006) held in-depth interviews with 33 mothers and 3 of their male partners in order to consider how a mother can either enhance or hold back children's progress in school. Results indicated that a commonality in mothers' responses was the high value that they placed on education, but that those who had negative experiences from their own school life found involvement with the school much more difficult than those who had had a "reasonable experience of schooling" (Reay,2006, p.64). Reay (2006) concluded that "available time, material resources, educational knowledge, information about the educational system and social confidence" played an important role (p.69). She also found that difficulties existed for women from different cultures, compared with those who were accustomed to the school system. The two research studies above, as opposed to Plowden's (1967) findings, showed that, although mothers had positive attitudes towards the children's schooling, they faced challenges in connecting effectively with the school system. Therefore, both the above studies although using different methodology, came to similar conclusions. I contend that the problems they have described, especially given the history of Roma people, were also encountered in my research.

More than forty years after 'Plowden', Brown and Rodriguez (2009) in the USA challenged the notion that barriers to education can be determined mainly by risk factors that have their roots outside school, such as poverty, race/ethnicity and parental attitudes. Their case study of two students focused on the barriers to education that led to school dropout. Brown and Rodriguez (2009) concluded that themes of "educational neglect and social alienation

emerged" from their analysis of data (p.228). "Educational neglect" was defined as being the ways in which their participants recognised or experienced the "inadequate opportunities afforded to them by the school" such as not providing help when needed, while "social alienation" referred to issues such as "powerlessness" or a "disconnection" with the school (Brown and Rodriguez, 2009, p.227), such as being singled out for negative attention or being pre-judged and discriminated against. No generalisations could be made from this study, but Brown and Rodriguez (2009) argued that it was in accordance with the findings of Fine (1991), who researched and wrote about 'drop-outs' from schools in America. Fine (1991) also referred to findings which were unconnected to parental attitudes to school, for example, pupils reporting teachers' lack of interest in them and unfair discipline procedures; however, her research which related to barriers to learning was not only connected to school factors but also included social class and family wealth. Brown and Rodriguez (2009) also contended that individual factors, such as class and poverty, were linked with school factors, for example, by a dependence on how the school responds to its pupils.

The research findings in this sub-section have led me to the conclusion that my study must consider how barriers both within and outside school as well as the interface between home and school have been addressed by the 'policy'.

## 1.4.2. Barriers to education encountered by Roma children in Europe

Although I consider that barriers to education for Roma children needed to be identified in order to ensure equal access to quality education, I have also contended that, throughout the history of Roma in Europe, issues relating to poverty, discrimination or a difference of culture from the majority population may be interconnected. Therefore, although in this sub-section I consider these factors separately, I do not imply that they act in isolation.

## *1.4.2.1. Issues attributed to poverty*

Absence from school, non-enrolment and early dropout have been found to be partly attributable to poverty. For example, when Romania was drawing up the 'policy', research carried out by Save the Children (2001c) in sixteen European countries proposed that the relative lack of success in formal education of Roma in all countries studied was partly due to the impoverished conditions in which many Roma families lived. Other studies, such as The Open Society Institute (OSI, 2001), included 'poverty amongst Roma families' as one of the eight barriers to education that emerged from their combined research findings and later studies also identified poverty as a barrier to education for many Roma children (Ringold *et al.*, 2005; EUMAP, 2007b; Symeou, 2015).

The examples given by Save the Children included the extremely poor living conditions, such as homes lacking water, electricity or sanitation, or Roma living in shacks or tents (Save the Children, 2001a, 2001b, 2001c). In Hungary, the study also referred to deteriorating living conditions (Save the Children, 2001b), while in Greece it was reported by one respondent that "many children do not come to school because they do not have proper clothes to wear and are embarrassed" (Save the Children, 2001c, p.41). The ability of parents to support education at home, regardless of their wish for children to succeed at school, by providing a space and conditions for homework, and supporting children's school work, was another issue reported in the above study. For example, in Italy some homes had no space for a table nor an electricity supply, whilst parents' lack of ability to support home learning through their own lack of education was cited in their UK study (Save the Children, 2001b). Symeou (2015), who reported on research carried out in seven countries by the 'School Education for Roma Integration' (SEDRIN) consortium, concluded that poverty was a major factor affecting most Roma. In four of the countries, including Romania, this research concluded that parents apparently were unable to acquire essential school supplies because of a lack of money. Symeou (2015) gave as one example:

> "For a period of one year I withdrew my child from school because I had no money to buy supplies and clothes… But I wanted her to study (Romanian woman)" (p.6).

I consider that the above examples demonstrated that poverty was a reason for non-attendance at school for some Roma children. However, other factors sometimes attributed to poverty are, I suggest, less clear, such as the need for children to work or "in the case of girls, to help in the household while parents work" (Save the Children 2001c p.41). EUMAP (2007b) proposed, in research they commissioned in eight former communist countries, that children in Macedonia, Romania and Montenegro were withdrawn from school because of the need for them to work. The assumption that 'needing to work' was solely as a result of poverty was given by the FRA (2014) survey to discover reasons why Roma children never attended school or else dropped out. Their questionnaire, which used self-identification to identify who was Roma, did not discriminate between needing to work and poverty, having one of the fixed options 'need to work for income/found job'. FRA (2014) concluded that "employment-related reasons for quitting education are just another dimension of poverty" (p.40).

On the other hand, Save the Children (2001c) concluded both that "children face a genuine trade-off between having to work now and their future earning power" (p.41) and that "some parents are not convinced that formal education offers significant education opportunities" (p.46). This suggested to me that, as opposed to FRA's (2014) conclusions above, 'needing to work' or 'finding a job' may in some cases be a family choice or tradition based on differences in culture from the majority non-Roma population rather than a necessity.

An English 'Department of Education and Science' research report (Wilkin *et al.*, 2010) drew from the 'National Pupil Database' to match a cohort of 'Gypsy, Roma and Traveller' pupils over a five-year period, together with a control group, in order to separate social and economic factors from those relating specifically to the target group. It found that even when controlling

for "gender, free school meals eligibility, deprivation and special educational needs they [Roma] made considerably less progress than their peers" (Wilken *et al*, 2010, p.102), thus proposing that factors other than poverty affected educational achievement. Wilkin *et al*.'s (2010) research also concluded that "there are complex inter-related reasons why the outcomes for Gypsy, Roma and Traveller pupils fall significantly below those for other children" in terms of educational underachievement (p.106). This also suggested to me that at the time of my study, whilst poverty may have been a significant barrier to education, it was not the only factor to be considered.

### 1.4.2.2. Issues attributed to discrimination

Discrimination by non-Roma pupils, often in the form of bullying, or by some non-Roma parents who took their children out of schools or classes where there were Roma pupils, as well as the discriminatory attitudes of teachers, were common themes in various research findings from different countries (Save the Children, 2001b; EUMAP, 2007b; Symeou, Luciak and Gobbo, 2009a; Flecha and Solera, 2013).

Rosinksy, Klein and Blandina (2009), who took part in the In-service training for Roma inclusion (INSETRom) prior to the training project, conducted a 'needs assessment study' of teacher perspectives. This study, elicited from semi-structured interviews with 15 teachers in Slovakia, concluded that the teachers preferred not to have Roma children in their class because they believed that Roma children had difficulty complying with rules, tended to steal and fight, and neither children nor parents had any interest in children attending school. Symeou *et al*. (2009b), who also took part in the INSETRom project, interviewed teachers, parents and children in three schools in the Greek-Cypriot system. For example, they proposed that teachers interviewed appeared to have stereotypical views of Roma children as teachers suggested that Roma were different from the other children because they were not interested in learning as it not was part of their culture. Symeou *et al*. (2009b) found that teachers' aspirations towards the education of Roma were for the

children to "progress just a little" and to "keep them busy" (p.516). Although this research found that parents were not unhappy with teachers, children reported that there was only limited learning in school and that they were not given homework, whilst some "expressed the need for help" (Symeou, *et al.*2009b, p.514). Similar views to the above were also echoed in multi-country research, such as Save the Children (2001a, 2001b) and OSI (2001).

Tangible results of teacher discrimination are reported by Gobbo, (2009) in her study in Italian schools where Roma children were reported as being placed at the back of the classroom. Similarly, Save the Children (2001a, 2001b, 2001c) in their research studies of Albania, Czech Republic, Macedonia and Romania also referred to Roma children sitting at the back of classes and being ignored. For example, in Macedonia, one Roma child explained the problem s(he) had with sitting at the back of the classroom:

> "in my classroom, I sit behind everybody else and sometimes I cannot see properly what the teacher is writing on the blackboard" (Save the Children 2001c, p.32).

Derrington and Kendells' (2007) longitudinal study of children in secondary schools in England from 2000–2005 included interviews with 44 'Gypsy Traveller' children plus their family members and teachers. Children involved in the study came from predominantly settled families. Data were collected from interviews with the children, their parents and teachers as well as primary and secondary assessment results. They found that by the age of 14, less than half of the children were still attending school whilst less than one third of the children completed compulsory school education. They concluded that there were multiple factors leading to dropout, which included discrimination such as the low expectations of teachers as well as the majority of children who said "that they were sometimes called racist names or were subjected to bullying in school" (Derrington and Kendell, 2007, p.27).

However, it should be noted that there were also positive experiences reported in studies. For example, Gobbo (2009), in interviewing 13 Roma children

in Italian schools, reported that 12 children had some positive comments, such as:

> "a teacher who was nice, fair to and protective of them, the classroom friends with whom they played… At the same time, they said that prejudiced teachers or classmates, last-row seating, the shower awaiting them in school, made them feel very unhappy, unpleasantly singled out and not welcomed by some" (p.529).

The comments expressed above emphasised that there were both positive as well as negative comments made by children.

Later research by Payne and Prieler (2015), conducted in a Sheffield Academy in England, was based on a project to improve the education of children of Slovak Roma migrants and found that teachers' attitudes toward Slovak Roma pupils were mixed, with some teachers arguing that Roma were "different from other ethnic groups and needed to change their attitude to learning in order to fit in" (p.47). Alternatively, more than half of the teachers interviewed held more positive views and referred to enjoying teaching Roma pupils. However, teachers had difficulty in persuading parents to visit them at schools, even though they had been given personal invitations. I consider that this difficulty could, at least in part, be explained by Reay's (2006) contention, given above that parents who had had negative experiences in their own education or those who were of a different culture than the other parents of a school found it more difficult to become involved with their children's school.

Similar issues were highlighted by Flecha and Soler (2013) in their longitudinal case study of a Spanish school that monitored an inclusion project for Roma children and families. As they suggest, before the implementation of the project, many Roma mothers expressed the view that they found it difficult or impossible to persuade their children to attend school because of teacher attitudes towards them. Parents also did not trust teachers as the study findings indicate. The authors argued that at this time, Roma children "experienced failure and had few opportunities to engage in actual learning"; and school lessons for them, unlike non-Roma children, involved drawing or colouring

and "did not offer any cognitive challenge" (Flecha and Solera, 2013, p.462). Following project implementation, however, after parents had been encouraged to participate in the project, not only was there a positive impact on school performance but also it challenged the discriminatory perceptions that parents were not interested in their children's schools.

Furthermore, curriculum design that either ignored the history and culture of Roma in their country or else included a negative portrayal in books available in schools was considered to be discriminatory in the Save the Children (2001c) research study, although they considered that the latter practice no longer existed in most schools. EUMAP (2007b) proposed that minority groups should be able to "recognise themselves and their culture in the schools' educational content" (p.37). The INSETRom series of school projects also specifically addressed the need to include Roma culture within the school curriculum. Several INSETRom studies found that, prior to their projects, teachers had very little if any accurate knowledge or training regarding Roma history or culture (Gobbo, 2009; Nikolaou, 2009; Symeou *et al.*, 2009b). Nikolaou (2009) concluded, in his study of Greek schools, that whilst teachers' perceptions of Roma tended to be 'misguided and superficial', a further difficulty for teachers was the need to follow the school curriculum, which did not allow them to focus on Roma cultures. Gobbo (2009), in the five Italian schools covered by her research, concluded that part of the reason why teachers lacked confidence in teaching Roma children was because of their lack of knowledge of Roma history and culture. However, despite feeling challenged about the possibility of teaching Roma history and culture, Gobbo (2009) considered that teachers wanted to meet this challenge

### *1.4.2.3. Differences of culture*

In a summary of research studies from 10 West European EU countries, Liegeios (1998) concluded that generally the aspirations and values regarding schooling were not the same for Roma as opposed to non-Roma parents and, in schools, Roma culture and language was marginalised and stigmatised.

Roma language was an issue addressed much later by the FRA (2014) survey but it reported that out of eleven countries, it was only in Greece that a small proportion (4%) of Roma participants selected language problems as reasons for stopping school. However, the report did refer to earlier research which had found that in Romania, problems with language had been given as a reason for not attending school. As I have argued above, Roma history is diverse; hence, a lack of language-related difficulties for Roma reported in some countries does not imply that language is an insignificant educational difficulty for Roma education in all countries or for all Roma within a specific country.

Myers, McGhee and Bhopal (2010) concluded that other cultural factors could adversely affect school attendance. Their findings were drawn from a pilot study in Southern England to consider "Gypsy and Traveller" parents' perceptions of education and included interviews with 4 Traveller Educational Services (TES) practitioners, whose roles included liaising with parents and schools with reference to the education of 'Gypsy and Traveller' children. All TES practitioners observed that "family obligations" affected school attendances. Other than work commitments and illness, one practitioner suggested "crises at home, funerals, weddings, baptisms and relatives in hospital, 'all those things will come before education, mostly, for the families'" (Myers *et al*, 2010, p.537). Another practitioner related an example of a family who had lost around six weeks because of travelling to a funeral with associated visits to other family members. Whilst I have not referred to this aspect of culture in most literature included in this review, it is possible, I suggest, that other studies did not refer to this issue because parents did not discuss cultural obligations either with teachers or with researchers whom parents may not have known and trusted to the same extent as TES practitioners.

Derrington and Kendells' (2007) study in England, previously referred to, also concluded that cultural issues as well as discrimination could lead to school dropout. These, they contended, included parental expectations that children would leave school early as well as negative attitudes of some

children from the age of thirteen towards school authority, because "Gypsy Traveller" children, as teachers reported, were treated more like adults within their home community, hence found it more difficult to accept the school's authority.

Differences in culture were also perceived to be a problem by Roma parents participating in the needs assessment INSETRom study in Cyprus, as well as by children (Symeou et al 2009b):

> "Roma participants asserted that their cultural background was completely unknown to teachers 'They do not know how we live here… Nobody asked us what we need'. Similarly, Roma children also referred to culture 'I would like my teachers to know more about the way we live. We celebrate different things, we eat different food'…" (p.515).

### 1.4.3. Issues specifically related to Romania

Difficulties with the existing and sometimes conflicting legal system in Romania were reported by McDonald (1999) and the Center for Documentation and Information on Minorities in Europe-Southeast Europe (CEDIME-SE, 2001). McDonald (1999) contended that the legal requirements for enrolling children:

> "for many Roma in Romania is an overwhelming and insurmountable task, not only due to a lack of financial resources but also to a giant state bureaucracy, which many Roma must face" (pp.188–89).

Both the above studies also reported the existence of conflicting laws which, at that time, made eight years of school compulsory but did not permit pupils who missed or needed to repeat three years to remain at school unless there were sufficient numbers for a special class of over-aged pupils to be created. CEDIME-SE (2001) reported that it was proposed to reduce the three-year rule to two years (this had been put into effect by the time of my fieldwork). McDonald (1999), in her case study, investigated the practicality of creating a class for over-aged Roma. Her study found that of 25 Roma who wished to

continue their education in order to become literate and numerate, several were over the age of 16 and hence excluded by another law stating that education was unnecessary for those over this age. Several other legal ambiguities meant that out of the 25 Roma only 9 children could receive school education, but this was not a sufficient number to form a class, hence all 25 children were denied the opportunity of a school education.

Later, EUMAP (2007a), in a study of equal access to quality education for Roma in Romania, used data collected from different documents and interviews with stakeholders in education, as well as commissioning three case studies. They found that legal requirements regarding enrolment were still in force some years after the implementation of the 'policy' which, they considered, prevented equal access to education for some Roma. These legal requirements included the need for a written request from parents, copies of the child's birth certificate, parents' identification cards (IDs) and a doctor's certificate. EUMAP (2007a) reported that data from 2004–2006 gave different results about those who lacked the necessary papers for enrolment, ranging from the official data, which stated that 4.7% of the population were without the necessary papers, to a study which showed that 25% of Roma did not have an ID and 45.6% were without birth certificates. This indicated that enrolment for some years after policy implementation remained problematic in the way that McDonald (1999) described. EUMAP (2007a) also noted that in Romania, children in school were not able to receive any specialist help to overcome educational problems except on the basis of medical and psychological needs whilst Horvath and Toma (2006), in a case study of a Transylvanian district, reported that only an estimated 10% of the Roma children attended pre-school education However, every teacher they interviewed told them that without this experience the children's vocabulary was very poor. According to the regulations referred to above, these children could not receive any additional teaching support. Seven years later, Plainer (2014) reported that this legislation still existed. Hence, I propose that Roma children who have had educational difficulties caused by lack of pre-school experience or other circumstances

such as poverty have been and may still be denied the opportunity of receiving additional school help. I consider that government laws, such as those outlined above, are examples of indirect discrimination of the part of the Romanian government, because although the laws had not been designed to discriminate against Roma, Roma were disproportionally disadvantaged.

Cozma, Cucos and Momanus' research (2000) investigated ways in which the Romanian educational system, prior to 'policy' implementation, had attempted to overcome difficulties regarding the education of Roma children by having segregated schools or classes, or alternatively having fully integrated schools. The researchers illustrated the difficulties that they encountered in their case study of a suburb which also included a separate but nearby Roma village. Conflicts had arisen between Roma and ethnic Romanians in the suburb, because 'Romanian' parents refused to allow Roma children to attend the school, yet there was no other school specifically for Roma children. The school, however, made an attempt to integrate all Roma children into the local school. The researchers concluded that their results demonstrated the necessity to develop new educational strategies for the Roma in this area because:

> "there was little opportunity to alter the functioning of the school in order to encourage a better integration of the Roma [and that] one of the major obstacles to the integration of Roma is not so much their lack of education and their refusal to give up their way of life, but of the very negative attitudes among the non-Roma… The majority of the population prefers to ignore the Roma, rather than adopt active integration tactics." (Cozma *et al*., 2000, p.287).

I suggest that the conclusions drawn from the above case study indicated that in 2000, the researchers considered it unlikely that a school system, designed to meet the needs or wishes of the majority culture, could be compatible with integrated schools and classes.

The case study conducted by Horvath and Toma (2006) also reported that teachers discriminated against Roma and also blamed school failure on Roma,

for example, because of the perceived "level of the intellect" (p.63) or their parents' lack of interest in school. Horvath and Toma (2006) also observed that children were segregated within the class: "During our visits to classes we could see that the Roma children's seats are always at the back of the class" (p.52). Another observation was made to Horvath and Toma (2006) by a teacher who explained that in one class with a majority of Roma children, the teacher had to "practise separately with each of them, on different levels, because the Romanian parent maybe expects a higher level from his child…" (p.54). Horvath and Toma (2006) also reported that there were high levels of absence and dropout from school by Roma pupils, concluding that there remained a long and hard way towards the effective implementation of educational policies and strategies for Roma. EUMAP (2007a), in their three case studies of schools in Romania, similarly concluded that although policies had been adopted which were aimed at improving the situation, "a range of serious obstacles to quality education remains for Roma children." (p.331). A later study by Fleck and Rughiniș (2008), which included a survey of 2,000 households together with 36 case studies of Roma communities, came to conclusions similar to those stated above including there being instances of Roma children sitting at the back of integrated classes and given less attention. The above studies revealed that even following 'policy' inception, issues such as discrimination, absences and dropping out of school seriously disadvantaged Roma children.

Horvath and Toma (2006) and EUMAP (2007a) also found difficulties for children in communities where Roma was the first language, although the national curriculum is taught in Roma as well as twelve other mother tongues. (Institutul National de Statistica, 2010). EUMAP (2007a) described a community where three different dialects of Roma language were spoken, whilst Horvath and Toma (2006) reported the difficulties of having classes taught in the Romanian 'standard Roma language'. In this latter community Roma were generally trilingual and could choose to go to classes taught either in Romanian or Hungarian. For those children whose first language was Roma, a teacher

explained that Roma do not know "the standardised Romani language; the Romani textbooks follow the logic of the Romanian textbooks, which is strange for the Roma" (Horvath & Toma 2006, p.67); also, that the way of counting was different from that of the national curriculum which was written in Roma, hence parents had rejected the option of the curriculum being taught in Roma language.

Towards the end of the ten-year 'policy', Duminică and Ivasiuc (2010), collected data from 70 Roma communities with a total of 77 schools and 23 kindergartens. They held 189 semi-structured interviews with teachers which included head teachers and 25 Roma school mediators (whose role was to improve links between home and school), as well as collecting data from over 1,500 structured questionnaires to parents and school-aged children. The research focused on Roma communities in low socio-economic areas. Duminică and Ivasiuc (2010) found that school-related determinants of absenteeism for Roma were the frequency of family visits to school, the child's appreciation of school and teachers and the child's school results; whilst home related factors reported were the "parents' degree of literacy and, less significantly, the mother's income earning activity" (p.105). Other reasons given for absences in this study were related to the need to work, to look after younger siblings or else poverty. They argued that discrimination of Roma children included teacher attitudes, for example, singling out positive examples such as 'clean' and tidy' Roma as if these were exceptions to the norm, or alternatively suggesting that Roma are different "as concerns culture and education, but also intellect to some extent" or that "[Roma] are indolent, badly behaved, with precarious hygiene" (Duminică and Ivasiuc, 2010, p.121). As with Horvath and Toma (2006), Duminică and Ivasiuc (2010) found that teachers blamed students for academic failure and dropout. The conclusion of this research study was that "the Romanian education system… does not manage to promote access to quality education for Roma children." (Duminică and Ivasiuc ,2010, p.175). This study highlighted that

the difficulties encountered by many Roma, which had been documented in other studies in Europe, also existed for the 70 Roma communities studied.

## Conclusions

Several million people who, for reasons given this chapter, I term as 'Roma', live throughout Europe yet they are a minority in every country they reside. I concur with the body of literature in this chapter that Roma are distinctive in that many have been, and still are, socially excluded from society, using the World Health Organisation (WHO) definition of 'social exclusion' as:

> "Dynamic, multi-dimensional processes driven by unequal power relationships interacting across four main dimensions – economic, political, social and cultural" (WHO, 2017).

I argue that the combined evidence of linguistic and genetic research of Roma communities throughout Europe giving Roma an Indic origin, although later augmented by many other ethnicities, is conclusive. However, Roma culture has evolved and is continuing to evolve, dependent in part on contact with surrounding past and present-day cultures; including evolving in different ways within one country (Fleck and Rughinis, 2008). I concur with Acton (2010b) that a major reason to adapt and change their culture is because of the discrimination and poverty that they have faced; thus, I contend that these three factors are interrelated. Furthermore, I contend that in terms of their effect on children's education this century, it is not always possible to distinguish between these factors.

From a reading of the research literature, it appears evident to me that many education systems have been designed for the majority culture, thus ignoring or rejecting the differences of Roma culture and the difficulties of discrimination they may have faced within their respective countries. This has specifically militated against Roma compared with other poor and disadvantaged communities within their jurisdiction.

Research has also shown that any policy to improve the education of Roma children needs to take into account not only what happens within the school but also the interface between home and school. Results of previous research specifically related to Roma children also highlighted that children's own experiences must also be taken into account, rather than assuming that either parents or teachers could understand them from the children's point of view. Evidence was also given in this chapter of the segregation of children within the classroom by Roma children sitting at the back of the room and being ignored. Therefore, I considered, it was also important to investigate whether this form of discrimination applied in my case study schools following ten years of 'policy' implementation. This chapter has provided information about the many challenges that the 'policy' needed to address, both in its design and its implementation.

# CHAPTER 2. Romania: education and policy

The first section of this chapter provides a context of Transylvania both before and after it became part of Romania. It includes the historical relationships between different ethnicities living in the region, followed by a discussion of education in the interwar years, prior to the onset of communism. The section concludes by considering Romanian family traditions regarding the education of their children. The next section considers influences and initiatives, both national and international, that led to the 'policy' and influenced its implementation. This is followed by a definition and justification of the policy model adopted as well as differences in understandings, and consequent difficulties of using the word "policy", encountered through direct translation from one language to another. The final section discusses how differences in perceived meanings of the 'policy', or alternatively misunderstandings in meaning by stakeholders, might affect its implementation.

## 2.1. Contextual issues
## 2.1.1. Transylvania: majority–minority relationships

Ethnic Romanians in Transylvania were in the majority; however, prior to unification with Romania, they were rarely a ruling culture and therefore had no input into educational policy. From at least the nineteenth century, Transylvania had alternatively been dominated by Magyars or Saxons (Paton, 1945; Dianconu, 2008). During this time, both ethnic Romanians and Roma faced discrimination. According to a written account by Paton (1945), in 1861, 'Daco-Romans' (Romanians) in Transylvania lived like slaves, not being permitted to wear boots, shoes, or a hat: only sandals, rough woollen dress and fur caps. However, in 1918, Transylvania became part of an enlarged Romania for several decades; hence the ethnic Romanians became part of the dominant culture.

In 1919, after Romania had increased its boundaries to include Transylvania, Romania needed to build up the identity of the newly enlarged nation state. Green (1997) argued that, in the history of education, national education systems were important in the state-forming process "which established the modern state" (p.131). This view was also given earlier in an interview in 1919 with the chief secretary for education of the Governing Council of Transylvania, who suggested that, following political unification with Romania, the reorganisation of education was "the most important, primary measure for its consolidation" (cited in Mihaylova, 2006, p.72). He also stated that:

> "the desired spiritual unity among all Romanians could only be achieved by means of standardization of the educational systems in all the Romanian provinces… The organization of the education on [an] equal basis throughout the entire territory of the country will contribute to building integrated national consciousness, directed by the same methods and goals" (Mihaylova, 2006, p.73).

I propose that such a policy to use the educational system to promote national unity may have become an agent, unintentionally or otherwise, to assimilate Roma people and other minorities into the Romanian majority national culture.

On the other hand, Butuca (2001) contended that, apart from the communist period, the educational system in Romania took account of ethnic differences and that there was a concord between majority and minority ethnic groups in all regions of present-day Romania. She added that since 1923 the rights of different ethnic groups, according to democratic principles, had formally been enshrined in the constitution of Romania. However, I argue that the rights of Roma could not have been recognised until 1990, when Roma people were formally accepted as an 'ethnic group' (see Table 2.1).

Although there was early evidence of discrimination against Transylvanian Romanians, much later, during Ceausescu's twenty-year dictatorial rule, ethnic Romanians were elevated at the expense of all other ethnicities, with the emphasis at that time being on all citizens becoming the "new Romanian communist man" (Shimoniak, 1970, p.375). An example of the emphasis

given to Romanian ethnic culture was given to me by different ethnic Hungarian friends who were born during this time and whose parents were forbidden from registering them with a non 'Romanian' name. Although this attempt at assimilation adversely affected other minority populations such as the Hungarian, German and Slovakian, unlike Roma, these peoples all had a 'motherland' to look towards. Many took the opportunity to migrate to their 'home' countries following the Romanian revolution in 1989.

Towards the end of the communist period in Romania, the entire population, other than a few elite party members, suffered from huge deprivation (Lazar, 1996). However, CEDIME-SE (2001) proposed that Roma people were the most affected financially because their lack of qualification led to mass unemployment.

## 2.1.2. Education in the interwar years

Romania's previous domination by powerful empires, such as the Austro-Hungarian Empire in Transylvania or the Ottoman Empire in other regions, meant that Romania had been accustomed to ideologies which were imposed from outside. Possibly in order for the newly expanded nation not to be dominated by two major influences that were now exerting their powerful ideology, German philosophical thinking to the west, and to the east the strengthening Soviet idealism, Romania may have chosen to look to America for ideas. It was recorded that Dewey's ideas of education became adopted, especially within the Ministry of Education (Sacaliş, 2006). Dewey's book 'The School and the Child', and later, 'The Schools of Tomorrow' written by Dewey and his daughter were translated into Romanian (Sacaliş, 2006). Dewey (1902) contended that teaching must start from the present standpoint of the child and should involve interaction between teacher and child rather than the teacher imposing a specific ideology. Once Romania fell under a Soviet regime, Dewey's influence was silenced and "overnight Dewey's ideas were buried and his books were moved to forgotten library annexes" (Sacaliş, 2006, p.72). As I discussed in the previous chapter, communist ideology was

based on indoctrination, hence was totally contrary to Dewey's ideas. To my knowledge, it was not until much later this century, in a conference held in Bucharest and consequent publication of a special edition of the Journal of Educational Sciences and Psychology in 2016, that interest in Dewey's works was revived within Romania's academia.

I propose that although the MER may have adopted Dewey's ideas in the 1930s, they would not have reached rural communities or those Ulrich (2001) referred to as 'worker and peasant families' where few children progressed to secondary school. Ulrich (2008) also proposed that during this period:

> "[T]he goal of education was the formation of individuals to act freely, creatively and responsibly in the democratic framework... [however] Romanian education was elitist, academically orientated in secondary and higher education…" (p. 172).

### 2.1.3. School and Family traditions in Romania

Vrasmas (2001) contended that traditionally, the family was very involved in the school education of their children because the "teaching [had] far too rich and demanding material, and the school often left to the family's care the additional training of the children at home" (p.180). She also suggested that parents devoted resources to supplement school education by paying for private lessons in addition to the school provision.

During this century, I have observed that the above tradition has continued. For example, many Romanian and Hungarian families both in town and country areas in Transylvania have told me that they pay private tutors to help their children with their schoolwork. I propose that, for many Roma families, not only paying for extra tuition but also the culture of spending time and money on school education would have been, and still is, impossible. As Chapter 1 demonstrated, Roma families generally had received little education and had worked in the poorest paid jobs prior to democratisation and, since then, the situation for many had deteriorated still further.

## 2.2. Democracy: influences and initiatives leading to the 'policy'

Following the revolution in December 1989, the first priority for Romanian education, before schools reopened after the Christmas break was a need to remove the communist ideological content from the curriculum. However, at this time, the former teaching styles remained with initial reforms concentrating on content and outcomes of education (Freyberg-Inan and Cristescu, 2006; Chircu and Negreanu, 2010). Ulrich (2001) contended that the repressive nature of the Ceausescu regime also required a "restoration of the basic democratic principles for the governance of the educational system" (p.133). However, I argue that rather than restoring Romanian education to its former principles, which Ulrich (2008) referred to as 'elitist', as cited above, the government looked outside to the WB and EU for help in order to introduce new educational policies and laws. This is illustrated in Table 2.1 (see p.70).

The 'policy' was contained within a ten-year strategy of 'Improving the condition of the Roma people in Romania' and hence needed to abide by the 'considerations' and 'general objectives' that related to the educational sector (see Appendix 2). At this time the 'policy' together with other policies relating to different sectors, such as housing, social security and health care were directed by the 'Ministry of Public Administration', who published its directives (in English as well as Romanian) through the Ministry of Public Information (MPI) (Ionescu and Cace, 2006). It was recognised by them that there was a need to 'remove stereotypes, prejudices and their practices' as well as to 'prevent institutional and social discrimination' (see also Appendix 2).

In 2003, following a government reshuffle, the above two ministries were disbanded (Ionescu and Cace, 2006); hence, the Ministry of Education (MER) became responsible for the 'policy' and in 2004 (MER, 2004) and 2007 (MER, 2007) issued ordinances which modified the original 'policy', using the terms 'equal access' and 'quality education' together with a

recognition that segregated schools were discriminatory. In 2007, there was a greater focus on inclusive schools, including a provision of inclusive school indicators. The evolution of the 'policy' together with its themes are given in Appendix 2).

**Table 2.1.** *Influences leading to the 'policy'*

| Policy and funding initiatives | comments |
| --- | --- |
| 1990 Roma legally recognised as a national minority | (PRPE, 2017) |
| 1991 New Romanian constitution | Included adhering to human rights conventions and all other international agreements, see Appendix 3 |
| 1991 World Bank involvement (Berryman *et al.*, 2007) | WB advised on the content of the 1995 Education Act and funded educational reforms |
| 1993 - 1999 Involvement with EU (Ionescu and Cace, 2006) | Signed the 'Copenhagen Agreement'; accepted as a candidate for EU membership, subject to enshrining in law a policy for improving the condition of Roma, including their education |
| 1995 New Education Act | Romanian Government (1995) |
| 1999-2010 | International Funded projects, relating to policy's strategy for the education of Roma through major grants from UNESCO, EU, OSI and others |
| 2000 signed the EFA DAKAR Framework for Action | UNESCO (2000) |
| **2001 'Policy' implementation** | (MPI, 2001) |

'Policy' implementation was funded partly by the government and partly by projects from international organisations such as the EU and UNESCO (MER, 2003; EUMAP, 2007a). Projects funded this way often served as pilot projects which were not carried out on a country wide scale; EUMAP (2007a) for example, concluded that the PHARE project "Access to education for disadvantaged groups, with a special focus on Roma" was effective in

piloting a variety of approaches relating to improving Roma access to education (pp.331–2).

The 'policy' themes included:

- Preventing discrimination (this included integrating schools)
- Encouraging enrolment and attendance of Roma children
- Training teachers in inclusive education
- Providing extra help for "disadvantaged pupils"
- Teaching and promoting ethnic identity
- Involving parents in schools, including in decision making
- Training and employing Roma school mediators

Rus and Zatreanus' (2009) guide on the role of Roma mediators, stated that in practical terms it should include:

> "facilitating communication between the school and Roma parents [and] fostering a school climate conducive to intercultural communication between Roma and non-Roma based on mutual understanding and recognition" (p.9).

In theory, the 'policy' was guided by Romania's adoptions of Human Rights Conventions (see Table 2.1). However, Tomushat (2008), in considering the universality of human rights, questioned whether being party to a 'human rights' treaty implied that there was a common agreement on meaning. He proposed that a government's motivation may only be to gain national or international legitimacy. Tomushat (2008) also contended that human rights conventions were formulated mainly by leaders of 'Western' countries and, although 'embraced' by former communist countries, proposed that "this victory of the 'Western' concept over its most potent adversary does not put an end to legitimate questions" (p.73).

Hajisoteriou (2010) contended that national policy making may have been constrained, at least at some levels, by becoming a member of the EU. Hajisoteriou's research, which focused on the Europeanisation of intercultural

education in Cyprus, concluded that the EU affected, at least, the discourse of policy making at ministerial level. However, her evidence, which encompassed investigations at both ministerial and school level, suggested that the Cypriot Education Ministry "deliberately omitted to develop effective initiatives toward the Europeanisation of the state-derived policy". In the former communist countries of East Europe, however, Grabbe (2003) suggested that the EU's coercive power would be greater than in both the former EU members and other newer non-former-communist Southern European members (such as Cyprus), because former communist countries were working from a lower financial starting point and were much more open to influence from the EU because of the need to transform from communism to democracy. Spirova and Budd (2012) also contended that the EU had a huge influence on policy making in Eastern Europe, not only because the benefits of membership outweighed any other consideration, for example by the provision of funds to aid specific policy development, but also that:

> "a candidate state moves up the list and closer to membership based on the progress made toward fulfilling EU membership requirement" (pp.49–50).

On the other hand, Spirova and Budd (2012) also gave the caveat that, based on conflicting sources of evidence, it was unclear how long or effective the EU accession process remained in terms of influencing domestic policy reforms.

In Romania, as can be seen in Table 2.1, the Romanian government looked to the WB for advice and funding (Berryman *et al.*, 2007) and was also influenced by other sources such as UNESCO (2000) and continued to modify the 'policy' following its accession to the EU. Thus, I propose that the process of accession to the EU may not have been the only driving force behind the 'policy'. However, bearing in mind the example of Cyprus outlined above, I consider that it is important to be aware that the discourse of policy at governmental level may not reflect the reality of the school situation.

## 2.3. Perceptions and practices of teachers and parents since democratisation

Regardless of government policies and legislation, opinions differed about how long the transition process to democracy took. For example, Freyberg-Inan and Cristescu (2006) contended that:

> "even though during the totalitarian decades school was discredited in the eyes of students and teachers alike, the habits of teachers and the expectations of parents (their former students) are deeply influenced by the circumstances in which education formerly took place." (p.83)

They proposed that "teachers who did not like questions from the class before 1989 did not like them after '89 either." (Freyberg-Inan and Cristescu, 2006, p.84). They recounted that they based this proposition partly on a study 'Școala la răcruce', which found that the teachers questioned did not consider that their activity should be judged by new regulations.

Popenici (2008) even proposed that fifteen years after the revolution, the former communist ideals still persisted with some teachers who were trained in communist times. He also claimed that the MER's reforms had made no appreciable difference to education, with each 'reform' made by successive Ministers of Education contradicting the previous one. Ministers frequently were replaced both prior to Popenci's (2008) assertion and after this time.

On the other hand, Ulrich (2008), proposed that the reform process improved significantly after 1995, following the enactment of the new Education Act, however she based her proposition on official reforms such as the Act rather than considering the perceptions and practices of teachers and their attitudes towards official reforms of education. Contrary to Ulrich (2008), I consider that although policies legislated for reforms, it must not take for granted that such policies would be accepted by teachers and parents even though they had been passed into legislation.

## 2.4. Defining the concept of "policy"

In using the concept of policy in the context of this research, I adopted Colebatch's (2009) definition which referred to a government policy, laid down authoritatively through legislation and ordinances, and which usually has a system of checks to see if such directives were being followed. Colebatch (2009) further suggested that this model, whilst laid down by a government, may also be based on influences outside the government, whether international or national. Therefore, I propose that this model was relevant to the Romanian situation as outlined in Table 2.1.

I also adapted Colebatch's (2009) stages of his 'authoritative' model (p.47) as shown below, for the purposes of my research:

1. *Determining goals:*
2. *Choosing a course of action:*
3. *Implementing the course(s) of action:*
4. *Evaluating the results:*
5. *Modifying the policy:*

This model can be considered as a cycle because, after having evaluated results, policy modification needs to consider the first three stages. In Romania's ten-year strategy the 'policy' was modified on several occasions (see Appendix 2). In Stage 2, when selecting a course of action, Colebatch (2009) contended that there was a need to consider how this action would fit in with previous policies or commitments made by the government, because that should limit the choices that are made. I also propose that this would also need to apply to modifications made over the ten-year period of 'policy' implementation. I provided evidence in the previous chapter which suggested that problems of incompatibility with other government policies was a factor causing problems in the education of Roma children in Romania. Hence, I needed to explore in my case study whether such factors were present during or after the end of 'policy' implementation and, if so, to what extent they affected the practices of education in the case study area.

Different understandings or even no understanding of the concept of policy was highlighted by Rado (2001), who proposed that different or no understanding of the word policy may be a problem, because in CEE countries there is usually no separate word for policy in their languages. Even when the word policy exists in an adjectival construction such as 'politici educationale' (as in Romanian), Rado (2001) contended that the distinction between "action aiming at capturing or influencing power and action aimed at changing or influencing the behavior of individuals or institutions" is not obvious (p.35). Rado (2001) suggested that a difference in conception of the word policy created a missing link between determining goals and making strategic decisions, which are the first two stages of the policy model given above. He referred to this as connecting "the expected and desirable outcomes with strategic issues" (Rado, 2001, p.38). Colebatch (2009) also considered that there may be problems in distinguishing between 'policy' and 'politics' when translating 'policy' into other European languages because of the different connotations that exist between languages. This is a further aspect that I needed to consider when discussing policy issues with participants.

## 2.5. Importance of perceptions in implementing policy reforms

Liegeois (2007b), an established expert on policies and outcomes for the education of Roma children, in his analysis of Roma education and public policies, concluded that:

> "between the definition of a national or European program and its resulting activities the path sometimes leads to dead ends or takes on unforeseen directions that can be in contradiction with the expected goals" (p.2).

Liegeois' analysis of the results of educational policies for Roma children provided evidence that government strategies to improve their education did not always work and in some cases were counterproductive. Hence, he proposed that a shared meaning of both a strategy and its goal was necessary for policies to be successful.

Fullan (2007) also contended that a shared meaning of both a strategy and its goal was necessary for changes to be successful. He proposed that, in education, policy-makers and local practitioners come from two different worlds: "To the extent that each side is ignorant of the *subjective* world of the other, reform will fail – and the extent is great" (Fullan, 2007, p.99). Any detailed assessment of what is happening with respect to the strategy and its goal, according to Fullan, should take into account the different meanings that policy-makers and local practitioners may have. Therefore, I suggest that according to both Fullan (2007) and Liegeios (2007b), different views of a policy for change needed to be both discovered and discussed in order for them to be successful. Fullan (2007) also proposed that parents have an important role to play, concluding that "educational reform requires the conjoint efforts of families and schools" (p.205). Therefore, according to him, parental perceptions of what a reform means would also play a part in the success or failure of a programme to improve the educational chances of their children. In the Romanian 'policy', neither local practitioners nor parents were involved in the policy-making process (MPI, 2001). Hence, following Fullan's theory, I propose that there may not have been a shared meaning of what the 'policy' or its intentions were. In accepting the above, I propose that I needed to consider not only the 'policy' strategy as given in governmental statements but the perceptions of it held by participants in my research who were affected by its implementation.

Following research which studied the responses of schools to new national science and mathematics teaching policies, Spillane (2004) took a "cognitive perspective on implementation" about why a policy decree was sometimes interpreted differently by practitioners (p.178). Spillane (2004) proposed that "local actors... may just misunderstand what policy makers are asking them to do" (p.6), even though 'conventional accounts' may assume that local officials understand what is meant by the policy and choose to follow it or not. His studies proposed that:

> "teachers and administrators frequently not only heed higher level policies but also work diligently to implement these policies...Yet the same studies

offer ample evidence of limited local implementation of state policies, suggesting that local officials' resistance does not account for any implementation failure'" (Spillane, 2004, p.7).

Spillane (2004) concluded that:

"cognition is complex and misunderstandings are commonplace. Hence, local officials' failure to do what policy makers ask can result from honest misunderstandings rather than wilful attempts to adapt policy to suit their own ends" (p.7).

He suggested one way a policy could be misunderstood could be described by a game where a message is passed from one person to another, after which it is discovered how the final report of the message differs from that originally sent. Spillane (2004) also proposed that state policy makers relay the policy to district policymakers who "construct understandings of these ideas and pass their understandings on to school leaders and teachers" (p.169). The game metaphor can only go so far, he proposed, because the message can also be received through other channels. Spillane (2004) suggested, in the context of North America, that these could be professional associations or academics. In Romania, I discovered that the media and government internet sites were also ways in which government policy was disseminated. However, I contend that the media may also have misunderstood the 'policy's' intentions, in the way that Spillane (2004) suggested above.

Both Spillane's (2004) conclusions about misinterpretation by practitioners and Fullan's (2007) description of different subjective world views of practitioners could, I propose, explain any problems of implementation of the 'policy' that may have occurred. Also, if as Fullan proposed, views of parents play a part in the success of policy, then considering whether they agreed with or contradicted those of the teachers of their children would be an important consideration in my research.

Although they considered problems of implementing policy in contrasting ways, Fullan (2007) and Spillane (2004) agreed that different perceptions of

policy exist and that these differences can prevent the successful implementation of a government policy. Using his experience in studying policies and their outcomes, Liegeois' (2007b) analyses went further than this by suggesting that the policy might be altered in a way that was contradictory to the original intention.

## Conclusions

Transylvania's history of different ethnic groups coexisting, but with ethnic Romanian as well as Roma being discriminated against prior to 1918, may have left its mark on the attitudes of Romanians towards the ruling ethnicities of the time. However I have argued that this was more than compensated by becoming part of Romania and even more during Ceausescu's dictatorial rule. However, I contend that Roma were discriminated against not only in the nineteenth century (see previous chapter) but, because they were not considered to be an ethnic group until 1990, also for most of the twentieth century.

I have argued that that educational policies prior to the onset of communism did not leave an impression on the development of new educational policy, either during the communist years, or afterwards following the change to democracy. Rather, I propose that the subsequent governments looked for ideas from outside the country to international bodies such as the EU and the WB, where they could also obtain help with funding the reforms. On the other hand, I suggest that the perceptions and practices of other stakeholders such as teachers and parents may have been affected by former practices, therefore I needed to keep this under consideration whilst investigating the different perceptions and practices of the 'policy'.

Adapting Colebatch's (2009) authoritative model of policy enabled me to separate out different stages of policy making and its implementation, considering how each related to the success or otherwise of policy outcomes in my case study,

and also whether or not the chosen courses of action fitted in with existing policy.

Finally, differences in understandings of the concept of policy especially when translated into a different language (Rado, 2001; Shklarov,2007), as well as the importance of having shared perceptions of a policy in order for it to be successful, as proposed by Spillane (2004), Fullan (2007) and Liegeois (2007b), demonstrated to me the importance of eliciting the perceptions of all participants involved in my case study rather than taking for granted that they would share my own understandings.

# CHAPTER 3. Defining meanings
## of equal access to quality education

For the purposes of this research I use Pring's (2004) definition of 'education', which referred to practices relating to the activities engaged in on the whole, by teachers, which are "usually formally planned and taught, which bring about learning" (p.16).

In this chapter, I categorise different theoretical viewpoints and meanings that have been given in literature of the concept 'quality education', including methods of assessing school practices in terms of their educational quality. I also consider different meanings of 'equality' and 'equal access. This enabled me to consider different meanings that might be made of the construct 'equal access to quality education' by 'policy' statements and participants of my research study. Moreover, it informed my own reflections of meaning, thereby helping me to consider my own position whilst recognising that it may be very different from that of participants in my study.

In policy statements, both in Romania and other countries, 'integration' and 'educational inclusion' were also used with reference to the construct 'equal access to quality education' (EUMAP, 2007a; 2009; UNESCO, 2009); see also Appendix 3. Therefore, I analysed ways in which definitions of the construct related to the differing meanings of these terms, also considering whether 'educational inclusion' and 'quality education' mean the same thing. I concur with Barrett *et al*. (2006) who contended that the purpose of school education was a prerequisite to defining 'quality education' as emphasised in their review of international literature on the definitions of 'quality education'. Hence, before analysing definitions of "quality education', I considered the possibility of whether there could be a universal agreement about purposes of school education. This helped me to understand both the possible concerns of different participants and also my own position. The chapter therefore starts

by considering whether there could be a universal agreement or alternatively whether different purposes or aims of education needed to be taken into consideration in the context of my case study.

## 3.1. Purposes or aims of stakeholders regarding education

Dewey (1916) argues that:

> "[I]t is well to remind ourselves that education as such has no aims. Only persons, parents, and teachers etc., have aims, not an abstract idea like education' (p.83).

In accepting this argument, I contend that it was the aims of participants in my study that was important for me to consider in my case study. Hence, I first considered whether it was possible to have universal agreement on at least some aims. Suppes (1995), after considering a diversity of philosophical views, proposed that:

> "every society and essentially all institutions responsible for the public education of the young recognize the priority that should be attached to instruction in the basic skills of reading, language and elementary mathematics" (p.119).

The 'basic skills' referred to above were also proposed by Fredriksson (2004) as being considered essential by teachers at conferences of international educational unions, and by a subsequent working group report on quality in education which stated that basic skills such as reading, writing and arithmetic were "necessary before further progression can be made within a quality system" (2004, p.4). The EC (2001) also supported Suppes' proposition in stating that "European countries are concerned about young people being given the opportunity to achieve "high standards of literacy and numeracy" (p.12). White (1982), on the other hand, expressed doubt about any educational aims being universally accepted:

> "If we were to insist on universal consensus before accepting any educational aims, I doubt whether we would get anywhere... Not even literacy would

get everybody's vote. Near-consensus would give us a highest common factor of the so-called 'basic skills' but precious little else" (p.129).

Suppes (1995) however proposed that there was no complete set of aims to suit everyone, therefore there needed be consensus or compromise in terms of all the aims. In response to Suppes (1995), Noddings (1995) argued that some aims are not even resolvable by compromise; therefore, she contended, we may have to live with conflicts.

As well as the aim of acquiring the basic skills of literacy and numeracy, a European Commission report (EC, 2001) also contended that providing "a stimulating school experience and [instilling] a desire for learning which will serve young people well for their lives beyond school" (p.12) was uncontested. I propose that consensus may be reached, in the context of my research, regarding the need to acquire the basic skills of literacy and numeracy, but this should not be taken for granted.

## 3.2. Defining and assessing 'quality education'

*The term "quality" of education qualifies for the World Championship of frequently used terms that are nevertheless considered indefinable.* (Scheerens, 2004, p.115).

There is wide recognition in the literature that the concept 'quality' in terms of education may be defined in different and sometimes conflicting ways, (Adams, 1993; Fredriksson, 2004; Leu, 2005), or even considered indefinable (Scheerens, 2004). This has raised the question about its usefulness in terms of educational policy pronouncements, such as those made by the Romanian government in their plans to improve Roma education and of international organisations such as UNESCO's EFA Dakar 'Framework for Action', to which the government was a signatory. The EFA Monitoring report following the Dakar Framework for Action (UNESCO, 2005) explained why their organisation considered it essential to use the term:

> "[I]t was recognized that expanding access alone would be insufficient for education to contribute fully to the development of the individual and society. Emphasis was accordingly placed on ... improving the quality of their education" (p.29).

However, they also contended that there were difficulties in defining what is meant by quality:

> "notwithstanding the growing consensus to provide access to education of 'good quality', there is much less agreement about what the term actually means in practice" (UNESCO, 2005, p.28).

In reviewing international literature regarding the concept of 'quality education', Barrett *et al.* (2006) considered alternative viewpoints, identifying two 'dominant traditions', an economist view using quantitative measures to determine quality and a 'progressive/humanist' tradition which is more likely to look at processes, judging quality on what happens in the classroom. Barrett *et al*. (2006) identified the WB as being dominated by the economist view, and UNESCO as being in the progressive/humanist tradition. Both the above international organisations influenced Romanian governmental policy-making, (see previous chapter), hence both positions may be relevant to this research.

Ginsberg and Schubert (2000) also considered different research approaches to meanings in order to assess quality education. Rather than identifying the two traditions given by Barrett *et al.* (2006), they referred to the three paradigms of positivist, interpretivist and critical science, in which "educational researchers may situate their inquiry" (Ginsberg and Schubert, 2000, p.7). In combining both Barrett *et al.*'s (2006) categories with Ginsberg and Schubert's (2000) different 'paradigmic' approach, the description of the economist view could accord with the positivist tradition which uses quantitative methods, whilst the 'progressive/humanist' view could be situated within an interpretivist paradigm which is more associated with qualitative methods and multiple viewpoints (Schwartz-Shea and Yanow, 2012). Critical Social Theory (CST), referred to by Ginsberg and Schubert (2000), is not included by Barrett *et al*. (2006) as a 'dominant tradition'; however, it is a distinctive research paradigm,

and so I have included it in my analysis of different meanings of 'quality education' as it was possible the view was shared by some participants in the case study.

## 3.2.1. Positivist / quantitative traditions

The input–process–output model is one often used when considering quality (Fredriksson, 2004; Galabawa and Ndibalema, 2005; UNESCO, 2005). Scheerings (2004) analysed different variations of this model. Although suggesting quality in education may be indefinable, his six possible definitions based on differing "conceptual frameworks" are described using quantitative indicators which can be instrumentalised to give a single result. Each stage of the model can be evaluated depending on the differing frameworks he proposed. He gave as an example the European Commission's "European Report on the Quality of School Education" (2001) which has sixteen quality indicators:
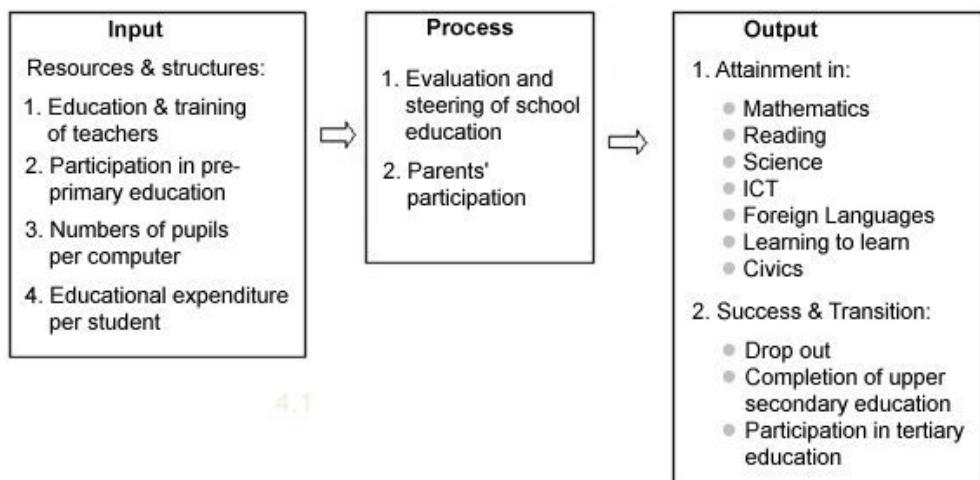


**Figure 3.1.** *Model of the European Commission's 16 quality indicators*
(adapted from Scheerings, 2004)

I propose that this model disregarded the possibility that stakeholders may hold different views of what the aims or 'outcomes' should be, and that the 'inputs' into education did not consider that the children being educated may

come from many different backgrounds. As the model was based on an EC document, I propose the model was likely to have been used by the EU to evaluate the Romanian 'policy' in order to assess the progress that had been made prior to accepting them as members of the EU in 2007.

Doherty (2008), in answer to his own question "what do you mean by quality?", responded:

> "Educational organisations have a diverse range of customers... with diverse and sometimes conflicting expectations… this accounts for differing perceptions of how to define/measure/assess it" (p.257).

Doherty (2008) proposed that in an evaluation of quality not only must there exist agreement on standards, but also that performance could only be evaluated either across a single organisation or other similar ones. He contended that there were "just too many contextual variables, some of them immeasurable in numerical terms for even the most sophisticated statistical methods to cope with" (Doherty, 2008, p.259). Therefore, he concluded that using contextual value-added indicators to measure output could only be an effective tool provided it was used within an institution or similar ones, rather than used for making comparisons in general. I propose that, given the contextual nature of different schools in Romania, an evaluation of 'policy success' in quantitative terms by assessing outcomes would be meaningless.

## 3.2.2. The interpretivist/qualitative tradition and its assessment

O'Sullivan (2006), in discussing quality education, referred to there being numerous and conflicting definitions because no single definition could apply to all situations, although she proposed that schooling should develop literacy, numeracy and essential life skills. In a consideration of quality indicators, she suggested that "input orientated indicators" fail because "they do not provide any understanding of what happens to the inputs, how they are used, in other words to the teaching and learning processes they can facilitate if used effectively" (O'Sullivan, 2006, pp.251–2). She also suggested that a

focus on outputs can be detrimental if children are taught by rote because it only tests the skill of memorising. She concluded that qualitative indicators that reflect what is happening in classrooms needed to be used in order to assess quality. In terms of evaluating 'processes' qualitatively, O'Sullivan (2006) found lesson observation a 'particularly useful' method; however, in her research she also included interviewing. Both observation and interviewing, O'Sullivan (2006) maintained, "can enable an understanding of classroom processes that can ultimately improve quality" (p.252). I also found that this combination was useful in exploring practices for my case study, rather than relying on either one or the other method.

UNESCO (2005), identified by Barrett *et al*. (2006) as being situated in the 'Humanist/progressive tradition attempted to reconcile a range of approaches', proposed that there should be a consensus viewpoint of quality education. Although, like O'Sullivan (2006), UNESCO (2005) stressed the importance of evaluating processes, however, the methods adopted used a survey style approach by asking questions with quantifiable results, for example, regarding the type of teaching methods used, rather than by classroom observation and interviews. I propose, however that a description of teaching methods alone may not reflect the reality of classroom situation, hence 'processes.'

## 3.2.3 Critical theory

Leonardo (2004), in discussing quality education from the viewpoint of 'critical social theory (CST), stated that "the multidisciplinary knowledge base of CST affirms the role of criticism as bound up in the definition of a quality educational experience" (p.11). Although he made no direct suggestions about how this could be assessed, his description of how it can be taught proposed that there would be a need to study the process of teaching across both general and subject specific lessons:

> "…quality education begins with a language of critique, at the heart of which is a process that exposes the contradictions of social life. Through

critical classroom discourse, teachers assist students not only in becoming comfortable with criticism, but adept at it" (Leonardo 2004, p.2).

The teaching method used would be an essential component of assessing whether or not teachers allowed classroom discourse, which is a prerequisite to critical discourse. The UNESCO (2006) EFA monitoring report, which considered the issue of educational quality, did take particular account of 'quality' in the critical tradition, and their framework for understanding educational quality included teaching methods in their scheme of assessments. Nguyen (2010), in applying CST to analyse EFA documents published by UNESCO, on the other hand, criticised the use of "observable, quantifiable and measurable learning outcomes" for assessing quality (p.346) which, she argued, indicated a positivist epistemology. Although I agree that quantitative methods cannot be used to measure critical discourse, as defined above by Leonardo (2004), qualitative observation, as suggested by O'Sullivan (2006) could be used to see whether or not critical discourse was included in school practice.

## 3.2.4. Definitions which conflict with each other and the need for context

While the different paradigmatic examples, illustrated above, did display contradictions Adams (1993) analysed other ways of defining quality education, such as those based on social or learning theories or on political or contextual issues. He also proposed that conflicts may occur in different definitions. As an example, he suggested that in some definitions "equity considerations may be aspects of a definition of quality" but in other definitions, quality and equity "have been viewed as conflictual" (Adams,1993, p.6). However, even though Adams (1993) analysed many, sometimes conflicting, definitions, he concluded that quality is definable, provided that it is in context.

The importance of context, has been highlighted by other authors, for example Leu (2005) and O'Sullivan (2006). Leu's (2005) literature review, which focused

on the role of teachers, schools, communities and process at the local level in creating quality education in less-developed countries concluded that quality was locally defined. Fredrikson (2004) defined quality education from the point of view of teachers, based on discussions of this concept made at several international conferences by teacher unions, highlighting the importance of taking into account the needs of each community proposed that:

> "quality education is the education that best fits the present and future needs of the particular learners in question and the community. The quality concept also has to embrace the development of *every* member's potential" (p.4).

I propose that the reference to the development of every "member's potential" was particularly relevant to the Romanian 'policy', which was specifically designed to remove discrimination, as I discussed in Chapter 2.

Rado (2001), in his analysis of the transition of education from communism to democracy, also highlighted the need for context:

> "Quality in education is always a contextual concept. This statement is rarely more valid than in Central-Eastern Europe after the collapse of the strictly controlled but – for the overwhelming majority – safe environment of the communist regimes" (p.69).

I argue that the proposed need for context transcended most of the given definitions of quality education outlined above. Therefore, whilst Adams (1993) contended that it is possible for quality education to be 'defined in context', the lack of agreement on universal aims, analysed above, suggested that if a workable definition of quality education is to be made for this research, it must **only** be in context of the education of Roma children of primary and junior-secondary age as defined by my case study.

## 3.2.5. My definition of quality education

Pring's (2004) definition of education, which I adopted (see above), added that "the evaluative sense of the word [education] implies that the learning is

worthwhile" (p.16). I propose that including this addition is congruent to a definition of 'quality education'. However, what is considered to be worthwhile, also needs to be defined.

My definition of worthwhile education, in italics below, is based on the importance I place on 'inclusive education' and draws from the three paradigms (positivist, interpretivist and critical theory) as discussed above, thus rejecting the need to conform to a single paradigm. It also takes into consideration the context of children in primary and junior-secondary schools in Transylvania, who have therefore not completed their compulsory school education. My definition of quality education is:

> *Those activities, on the whole, formally planned and taught, which bring about learning" which is also worthwhile (as I define above). Education should be inclusive and effective in terms of the learning process, thus considering the needs of all children. Teaching must start from "the present standpoint of the child" Dewey (1902, p.16) and include the basic tools, such as literacy and numeracy, as well as developing an inquiring and questioning mind in order that children have the capacity to continue their education at least to complete compulsory school education and be helped to prepare for adult life.*

## 3.3. Differences in perception of 'equality' and 'equal access' in education

Samoff (1996) analysed the WB views of education, proposing that they considered equality to be related to 'sameness', which Samoff (1996) defined as meaning that children are not treated preferentially, for example because of race or gender. He gave as examples, being given better text books or taught in smaller classes. As shown in Table 2.1, the WB was instrumental in directing Romania's educational policy in the 1990s, including its 1995 Education Act; hence, I propose a plausible reason why this view may have been adopted by the Romanian government. I consider, however that this

definition could be viewed as contradictory to the aim of providing education that meets each child's needs, which was suggested in the Dakar EFA Framework for Action (UNESCO, 2000) and officially adopted by the Romanian government in 2000. Hence by Romania's constitution the latter definition needed to be included in the 'policy'. Therefore, I propose that provided that the MER had taken into account the Dakar Framework for Action, the WB's definition (Samoff, 1996) would have been rejected by the 'policy'.

Espinoza (2007), in analysing different views of 'equality' and 'equal access' also referred to a view that equality could mean "sameness in treatment"; however, he contended that if it was combined with distributive justice, it would also demand "equality of results":

> "When 'equality of access' is not combined with the systematic provision of educational services that are necessary for 'equality of attainment', 'equality' stops and inequality takes over. 'Equality of access' by itself will not lead automatically to 'equality of attainment' without direct and focused interventions tailored to each student's educational needs" (p.347).

Thus, he proposed that rather than the WB view of treating everyone the same, equality of access could also mean that education should focus on meeting the needs of each student.

## 3.4. Some theoretical meanings of the construct 'equal access to quality education'

The previous sections argued that there are different perceptions about the meanings of 'quality education' and of 'equality of access'; hence, it follows that there will be differences in perceptions of 'equal access to quality education'. As I concluded in the previous chapter, I consider that differences in perceptions between those influencing the policy, educational practitioners and other stakeholders could have been crucial in the success of its implementation.

The description of categories, shown in Figure 3.2 below, summarises possible meanings based on the theories discussed in this chapter, observations made in

the literature reviewed in Chapter 2 and Rado's (2001) analysis of communist-style education. However, I consider they are by no means the only possible meaning that may be held by either the Romanian government, MER or participants in my study. For this reason, possibly the most important category illustrated below is "other meanings".
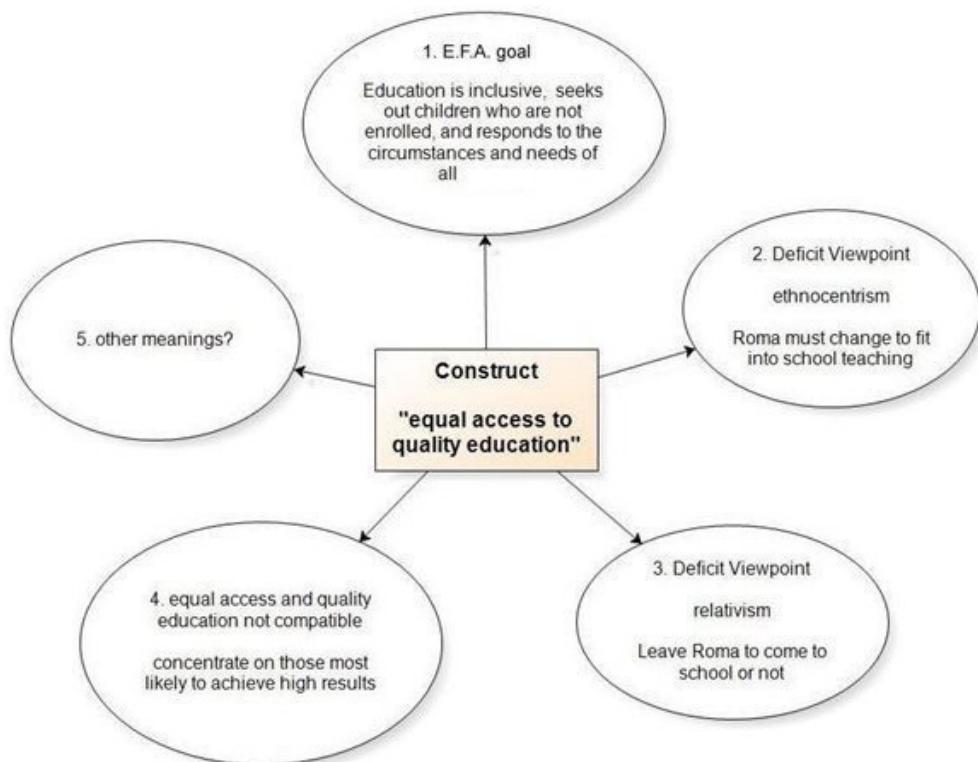


**Figure 3.2.** *Perceptions of the construct 'equal access to quality education'*
(as devised by me from different theoretical concepts of 'quality education' and 'equal access')

## 3.4.1. EFA goal

This is clarified by a fuller statement of Dakar 'Goal 2', which also included how it could relate to Roma children:

> "In order to attract and retain children from marginalized and excluded groups, education systems should respond flexibly, providing relevant content in an accessible and appealing format. Education systems must

be inclusive, actively seeking out children who are not enrolled, and responding flexibly to the circumstances and needs of all learners" (UNESCO, 2000, p.16).

It concurred with the definition of quality education given by Fredriksson (2004) and Espinoza's view of 'equal access' as well UNESCO (2000). The EC (2001), although having quantitative indicators (see Figure 3.1), also concluded that all education systems should be inclusive (EC, 2001). The 'EFA' meaning of the construct also accorded with my personal definitions of 'quality education' and 'equal access'. Both in signing the DAKAR 'Framework for Action' and later, in an ordinance which defined inclusive schools (MER, 2007), it suggested that the Romanian Government tacitly agreed with this definition of the construct.

## 3.4.2. Deficit theory: ethnocentrism

Miskovic (2009), who reviewed research findings and policies relating to Roma education in Europe, contended that the European education system was based on an ethnocentric approach which blamed higher levels of absence of Roma children on their inability to accept Western culture and values as the only model.

Valencia (2010) analysed different aspects of deficit thinking. His different forms included victim blaming, differential power relations and various forms of racism such as a belief in inferior culture or genes and lack of educability. Liegeois (2007b) also referred to a widely-held view of 'blaming the victim' with respect to problems of Roma education: Valencia's first form of 'deficit thinking'. Evidence of Roma being considered, in Valencia's terms, an 'inferior culture' is exemplified in Anăstăsoaie's (2003) account of the communist report which stated that Roma had "a backward mentality", as related in Chapter 1 . More recent surveys of Romanian opinion of Roma people have also provided evidence of similar discriminatory attitudes, such as the belief that Roma are lazy, (Popenici, 2008; Ulrich, 2008; Toma, 2012). Hence, I

contend, Valencia's theories on deficit thinking are relevant in a discussion of Roma education for my study.

### 3.4.3. Deficit theory: relativism

Relativism is also described as a deficit viewpoint and refers to differences in culture but does not necessary consider that Roma people must change in order to fit into the existing educational system. Vargas and Gomez (2003), in their research, described this as the view that "the schools are already designed, and the families have to accept them as they are or forego their children's education" (p.568). Horvath and Toma (2006) also proposed that the relativist approach was relevant to their research of Roma education, describing the viewpoint as one which does not evaluate the different cultures; therefore "their lack of access to educational opportunities are only manifestations of their cultural differences" (p.32). Using the descriptions of relativism outlined above, successful implementation of the policy to provide 'equal access to quality education' could theoretically mean that school places were available for Roma in integrated classes, hence that they have equal access to the same provision as non-Roma children, but that parents could decide whether or not their children should attend school. This is contrary to the ethnocentric viewpoint above which considered that all Roma children should be at school.

### 3.4.4. Incompatibility of 'equal access' and 'quality education'

An incompatibility between equal access and quality education was posed by Adams (1993) where 'quality' meant concentrating on those who are most likely to achieve excellent results in tests of attainment. This understanding of the construct was also in accord with the communist model described by Rado (2001), where those who held this view of 'equal access to quality education' may understand the construct as meaning full enrolment and attendance of Roma children in schools but where teaching is directed towards enhancing the achievements of 'talented' children regardless of ethnicity.

## 3.4.5. Other meanings

The number of different ways in which both quality education and equal access can be perceived, makes other categories of meaning likely, and therefore must be explored in my case study.

The categories described above are not necessarily mutually exclusive. For example, holding a deficit perception does not preclude someone from also holding the views expressed in the fourth category. However, I suggest that someone who agrees with the EFA goal of inclusive education could not hold either a deficit viewpoint or one which considers quality education as meaning that teaching should be directed towards 'talented' children, as described in the fourth category.

# 3.5. Links between, 'integration', 'educational inclusion' and 'equal access to quality education'
## 3.5.1. Distinguishing between integration and inclusion

There is widespread agreement in the literature that the definition of integration in the context of school education refers to the right of children to enrol in the same schools and attend the same classes as their peers (Clough and Corbett, 2000; EUMAP, 2009; Polat, 2011). For example, Polat (2011), in her discussion of theoretical definitions relating to inclusion and social justice, defined integration as the physical placement of children together in the same class. Accepting this definition, the four defined categories of meaning of 'equal access to quality education', outlined above, would include integration. Both Polat (2011) and Clough and Corbett (2000), in their analysis of the different meanings of inclusion, considered that integration is distinctive from 'inclusion'; rather, it is simply a step towards 'inclusion'. Therefore, I propose that, in statements of policy regarding 'equal access to quality education', misunderstandings may occur if 'integration' is confused with 'inclusion'.

## 3.5.2. Defining 'educational inclusion'

The definition of educational inclusion is more controversial than 'integration' because it is defined in different ways in the literature. Armstrong, Armstrong and Spandagou (2010), for example, referred to there being a "common adage that *'inclusion means different things to different people'*" (p.12). In the same way that there are differences in meaning of 'quality education' , there is some agreement in the literature that definitions of 'educational inclusion' must be taken in the context of a particular school or situation (Ainscow, Booth and Dyson, 2006; Pather, 2007).

Clough and Corbett (2000) related differing perspectives of inclusive education to the historical development of the concept. The earliest perspective, they recounted, was a "psycho-medical" legacy which led to programmes "designed to strengthen the cognitive or perceptual deficits" (Clough and Corbett, 2000, p.12). Thus, in this sense, it was the child rather than the educational process in school that was 'deficient'. This understanding of inclusive education meant including a child into mainstream education by supporting them with a programme to alleviate their 'deficiency'. Although Clough and Corbett (2000) focused on 'special education', rather than considering cultural or ethnic differences which may lead to the educational difficulties, the deficit perception described above, I consider, had direct relevance to the context of my research. For example, in Romania, if children are perceived to have any difficulties, in order to receive additional educational support they must be assessed to decide on a degree of "handicap" (Plainer, 2014). Therefore, I propose that the above meaning of educational inclusion would be accepted by those I described as having an ethnocentric view of 'equal access to quality education' (see Figure 3.2).

According to Clough and Corbett (2000), perceptions of inclusion evolved from the 'psycho-medical' view, with the focus changing from the child's inability to fit into the education system, to a sociological perspective which defined labelling of children in this way as a social and discriminatory

construct. From this more recent perspective, they proposed that the focus of inclusion was on the improvement of the curriculum and of schools so that they could accommodate and meet the needs of all pupils. Barton (1986), who held this sociological perspective of inclusion, also included the position of 'young blacks', who in Britain of the 1960s and 70s, were sometimes defined specifically as a group that suffered from "personal or cultural inadequacies" (p.278). Hence, I propose that he expanded Clough and Corbett's (2000) discussion of inclusion, to include 'cultural' perceptions of difference. Writing a decade later, specifically about educational inclusion, Barton (1997), in discussing sociological and discriminatory labelling of children, proposed that part of inclusion was to have a 'human rights' approach to education. In this way, Barton (1997) emphasised that inclusive schools should ensure that equal rights to education are accorded to everyone by responding to diversity, rather than by labelling some children within a category of 'special needs'. The human rights approach, he proposed, improved the quality of education for all children because it worked towards the achievement of an inclusive society where all people are valued equally and have an equal, democratic voice as citizens. Barton (1997) described this challenge for teachers as an "ideological and political struggle" (p.240).

Ainscow *et al.* (2006) described their understanding of inclusion as a 'broad' view, making reference to the EFA movement which also, like Barton (1997), welcomes diversity by valuing all children equally. Within their definition of inclusive education, they favoured having community schools which are arranged so that children are collaborating together in mixed groups, ensuring no selection or exclusion for any reason. Using Clough and Corbetts' (2000) different historical theories of inclusion, I propose that this view related to the definition which focused on the need for "school improvement strategies" (2000, p.9). Included in Ainscow *et al.'s* (2006) definition, they argued that "the aim of inclusion is to reduce exclusion and discriminatory attitudes including those in relation to age, social class, ethnicity, religion, gender and

attainment" but they contended that "it would be a mistake to assume that this framework of values is uncontested" (p.2).

Pather (2007) expanded on the view that no single definition of educational inclusion can be made, giving an example from a UNESCO four-year inclusive education development project in South Africa where, following apartheid, a system of "black" and "white" segregated schools had been merged. The project's initial definition of educational inclusion was "broadly defined" as "incorporating the needs of all learners not just those with disabilities" (Pather, 2007, p.632). Two years after the project implementation, Pather (2007) discovered that the project team's 'most significant concern' related to a confusion about what 'inclusive education' meant because they had understood it only related to those with disabilities. For these reasons, in order to 'demystify' the term 'inclusion', Pather (2007) proposed that inclusion in education be redefined as "that which is fundamentally about achieving quality, appropriate education" (p.627). She added to this definition that inclusion must incorporate the needs of all learners. Pather's (2007) revised definition of inclusive education, I suggest, was much less specific than those of Barton (1997) and Ainscow *et al.* (2006). Pather's (2007) lack of specificity, I propose, ensured that those practising 'inclusive education' were less likely to label children who are perceived to be different through having disabilities or being in a recognised minority in terms of ethnicity or culture. This more general definition of educational inclusion, together with a human rights perspective of treating all children equally without discrimination, accords with my own definition of educational inclusion given in the context of my research, which was:

> *Educational inclusion means, firstly, welcoming Roma children into school classes and, secondly, addressing individual children's needs, so that all Roma children, alongside their non-Roma peers, can enjoy an enhanced quality of education.*

### 3.5.3. Does practising 'inclusive education' ensure 'quality education'?

In the different views of 'inclusive education', I consider that a common theme was that children are taught according to their individual needs. However, I propose that any consideration of whether a child's 'needs' are being met is also dependent both on what the school or teacher believes to be the purpose of education, as discussed above, and on whether a teacher is able to teach a class effectively. Hegarty (2001) explored the difficulties of using the term 'inclusive education' as the sole guiding principle of good educational provision. He concluded that teachers, whilst being concerned with the 'inclusion' of all their pupils, nevertheless had to teach their subject, otherwise they "run the risk of producing young people who are ethically rounded but otherwise ill-educated" (Hegarty, 2001, p.246). Whilst using my definition of inclusive education which included 'meeting all children's needs', I agree with Hegarty's (2001) suggestion that some teachers will be more effective than others in providing quality education within the framework of inclusive education. My contention is, therefore, that inclusive education, rather than being congruent with quality education, is a necessary prerequisite to it.

## Conclusions

Throughout the chapter an emphasis, in much of the literature discussed, was that definitions relating to 'equal access to quality education' needed to be made in context and even then, there will be differences in perceptions. I considered that needed to be taken into account when deciding on the methodology used. No aims or purposes of education were universally agreed upon, although some writers contended that, in context, a consensus could be reached. I considered the above was important to recognise in any discussion of perceptions of an educational policy or school practices. I also needed to reflect on my own perceptions and not allow them to cause me to make judgements on other points of view.

Combinations of the different definitions of 'quality education' and 'equal access' led me to develop four possible categories of meaning of the construct; however, within these categories, I consider that there could be further differences. For example, in the category of the 'EFA goal' above, what is meant by 'children's educational needs' is open to different meanings dependent on their own perception of the purpose of education. Also, the broad categories of meaning, whilst summarising the literature in this chapter, did not take into account all possible meanings. Some people's definitions may reject all my defined categories, for example by holding the view that children should be segregated. This view was held by participants in some of the research studies reported in Chapter 1. I therefore considered that other viewpoints could be held, so it was important to include the final open-ended category of "other meanings".

This discussion of differences in meaning of what might constitute 'inclusion', I considered, was important in the analysis because such differences may also affect perceptions of a 'policy' which specifically referred to inclusive education (EUMAP, 2007a).

# CHAPTER 4. Methodology of the research study

As related in the preface, the research was motivated by an approach for help made to me by Roma parents and schools' directors regarding the education of Roma children. This request for my help was despite the existence of a national ten-year strategy to improve the situation of Roma, that included a policy of 'equal access to quality education' for Roma children. I had found no direct information about outcomes of the policy, nor any research which been carried out to explore what was happening within the school environment. Neither had any teacher or parent referred to the government policy in their request to me for help. Therefore, I decided to explore what was happening at grass roots level with regard to this policy. This resulted in the research question below:

> *What are the perceptions and practices that affect the realisation of the Romanian government's policy to achieve equal access to quality education for Roma in a rural Transylvanian Community?*

I defined the 'policy' as the part of the Romanian government policy, within their ten-year strategy, for "improving the condition of the Roma" (MPI, 2001), initiated in April 2001, which applied to the education of Roma children enrolled in state primary and junior-secondary schools. (see Appendix 2). The definition of 'Roma' used for the purpose of this research referred to those who were labelled as Roma by the schools' director in the case study district. This did not suggest that they were a heterogenous group, but by being labelled under the single exonym by the schools' director, I considered it was this group of children to whom the 'policy' was addressed within the schools' community.

The first section of this chapter discusses how I determined that a single case study of a rural self-administrating district in Transylvania was the most appropriate focus for my research. Next I elaborate on the case study

design followed by deciding on research sub-questions. This allowed me to determine what type of data was needed that might be best suited to answer or give me a greater understanding of the research question. The following section reflects on my own philosophical position in relation to arguments in the academic literature about ontology and epistemology, which enabled me to determine that interpretive methodology was the optimal paradigmatic solution. I then outline its advantages together with the methods needed in order to ensure the quality of an interpretative study. Following this, I discuss the methods used for data collection and analysis, including issues of culture, language and insider/outsider status. The chapter concludes with a further ethical consideration that must be made through the course of this thesis.

## 4.1. Selecting a single case study

Creswell (2007) and Stake (2006) defined case study research as the study of an issue or concern set in a specific context; hence being situational rather than generalisable. However, Stake (2006) added that a case study may also relate to other cases, while Schwarz-Shea and Yanow (2012), citing Lincoln and Guba (1985), expanded on this by proposing that research contexts should be described in a thick way so that the reader can assess the relevance of the work to their own setting.

Yin (2009) proposed that while there may be descriptive, explanatory or exploratory case studies, the latter should consider what is to be explored as well as its purpose. Thomas (2011) also added that an exploratory case study is carried out "when you are faced with a problem or an issue which perplexes you" (p 104). As I reported in the introduction to this book, Romania had been praised by EUMAP for making great strides in implementing policies relating to equal access to education; yet, they and others had also reported that the effects were, at best, minimal. I consequently decided to select an exploratory case study with the purpose of exploring not only what those concerned with Roma education understood about the 'policy', but also how practices in schools and their environment had affected its realisation.

A 'case' can also be described as a bounded system (Merriam, 2009) where the boundaries of the case define the unit of study. My definition of the unit of study and its boundaries was:

> *The implementation of the government policy of equal access to quality education for Roma as applied to children eligible to attend primary and junior secondary school within a specific rural self-administrative district of Transylvania. The district included two village schools which taught ethnic Roma, Romanian and Hungarian pupils. It covered the time period of field work from May 2010 to June 2012, and included stakeholders involved in the education of Roma children in this district; that was, those in administration at various levels, practitioners, Roma parents, pupils and former pupils.*

Initially, I had considered either conducting a survey, using multiple case studies or a single case study. I rejected the survey method, although my previous research and teaching background had given me a familiarity with statistical methods and questionnaires. Also, it was a method advised by EUMAP (2009) as a way to improve access to education for Roma in the eight countries they had studied by discovering "who is succeeding, who is failing, and how to make appropriate policy changes" (p.4). The problems I found with this approach were:

1. The method of identification of 'who is Roma', might vary between survey participants, as discussed in Chapter1.
2. It would be impossible to compare progress in order to "discover who is succeeding, who is failing", as suggested by EUMAP above, even by using 'value added' indicators. The problems with this were argued by Doherty (2008), as I outlined in Chapter 3.
3. It would not provide an all-round account of what was happening in terms of school processes, nor could it include the richness of detail that interviews and observations would provide.
4. As a single researcher, I would not have added significantly to information that could be provided by major surveys, such as the FRA (2014), which

studied the education of Roma children in 11 EU member states in areas with an above-average proportion of Roma residents compared with non-Roma.

Multiple case studies were also rejected because, although they could provide more detail than a survey in terms of being able to observe classroom processes and interview stakeholders, it would be difficult to be studied simultaneously by a single researcher, given the problems of travel between rural areas in Transylvania. Also, the changes of government and consequent changes in general educational policy could add extraneous factors, making comparisons less valid if studied consecutively. Multiple case studies also had the first two problems I associated with surveys, as outlined above. Hence, for the following reasons I considered that a single case study had the greatest advantage.

## 4.1.1. The advantage of conducting single case study

One advantage in using a case study as opposed to a survey is that issues which have not been considered prior to data collection, through a reading of the literature or by pilot studies, can come to light. Stake (2010) proposed that "Often issues are emic (emerging from the people) more than etic (brought by researchers)" (p.15). One of Yin's (2009) proposed rationales for studying a single case included when it was a "representative or typical" case where "the objective is to capture the circumstances of an everyday or commonplace situation" (p.48). A second rationale was when an investigator has the opportunity to observe and analyse a phenomenon previously inaccessible to social inquiry" (Yin, 2009, pp.48–9). I argue that both above rationales were relevant because I was able to observe everyday lessons for Roma and non-Roma children, in a typical Transylvanian rural community, on different days and times of the year, as well as for the full range of subjects taught, and to interview stakeholders who were connected to the same setting, such as county and local authorities, teachers, pupils and parents. Also, I had possibly a unique opportunity to study a particular Transylvanian community from the perspective of a western European teacher who was known within this community by all

ethnic groups. In both the above contexts, I was already a familiar face around the villages and in both schools where children, parents and teachers were accustomed to seeing me inside the classrooms or school buildings. Therefore, although of a different ethnicity and culture, both adults and children were accustomed to talking to me and appeared to accept me as part of the schools' communities.

Thomas (2011) proposed that a case study could create a three-dimensional picture of what is happening and why. He added that case studies are particularly useful for looking at processes and are able to put stress on contextual issues; both of these factors are important to my research. Whilst Yin, (2009) suggested that case studies had limitations, he also considered their strengths:

> "case studies arise out of the desire to understand complex social phenomenon... case study method allows investigators to retain the holistic and meaningful characteristics of real-life events… such as... school performance" (p.4).

One criticism sometimes made of case study research is its lack of generalisability. Yin (2009), however, contended that the purpose of a case study is not to generalise in terms of considering the frequency of events and therefore is not intended to be a representative sample of a population; rather, it is generalisable to theoretical propositions. Subjective bias is also a disadvantage that is also sometimes levelled at case study research. In addition, Merriam (2009) proposed that case studies look for and do not discount discrepancies in data and acknowledged that there are no simple answers. Similarly, Yin (2009) proposed that researchers must avoid bias in case studies by maintaining an openness to contrary findings and by seeking out alternative explanations (p.72).

Provided that I recognised the case study's lack of generalisability and plan how to minimise the possibility of subjective bias, for example through reflexivity, I contend that, given the advantages above, a single case study was the optimal solution in order to provide the necessary in-depth information to address the research question.

## 4.2. The design of the case study

Thomas (2011), in his book on case study design and execution, collated the factors relevant to the design of a case study given by six theorists and practitioners, which included his citations of Merriam (1988), Stake (1995) and Yin (2009), also adding his own ideas. I have used Thomas's (2011) ideas, with some modification, in order to illustrate my own case study design.

In proposing possible case study designs, Thomas (2011) excluded Yin's rationale of 'typicality' for the selection of a case, arguing that no two cases can be the same and therefore there could be no such thing as a typical case. On the other hand, Thomas (2011) included the notion of an outlier or atypical case and therefore one that, I contend, could be described as 'untypical'. Contrary to Thomas (2011), I propose that it was important for readers to know whether or not they could expect that aspects of a situation described in a study might be happening elsewhere; hence, I include Yin's (2009) criterion of typicality. Also, I consider that for policy-makers, less importance might be given to a case that they considered to be 'untypical'; therefore, at least, a reason for the choice of a case must distinguish between untypical and typical. Hence, I include typicality as part of my case study design. This was reference to the fact that it was situated in a rural Transylvanian multi-ethnic local administrative district. Both the multi-ethnic nature of Transylvania and that, in Romania, 45% of the population lived in rural areas (Save the Children, 2001a), provided evidence to support that the case study district was not untypical, although I recognised that it was not necessarily typical of every rural district.

## 4.3. Developing the research question: sub-questions and types of data needed

It is generally agreed that multiple methods of data collection may be used for case study research (Stake, 2006; Creswell, 2007; Yin, 2009). Stake (2006) also suggested that "researchers may gather other data than case data" in order to

answer their questions. Having decided on a single case study, I developed initial sub-questions and determined which data collection methods would be most appropriate to inform answers. The sub-questions are listed below:

1. What are the perceptions of teachers, parents, local councillors and county educational authorities of the policy to achieve equal access to quality education for Roma?
   *(Data collected from interviews with stakeholders from county and local authorities, teachers and parents and relevant documents.)*

2. What are the current practices in the case study area that affect the realisation of the 'policy', regarding the education of Roma children*?*
   *(Data obtained as above plus quantitative and qualitative observations of classroom processes, field observations and interviews with Roma pupils and former pupils and quantitative data to consider the pattern of pupil absences.)*

## 4.4. Philosophical considerations

## 4.4.1. Description of worldviews which may combine qualitative and quantitative methods

Having decided to include both qualitative and quantitative methods, I considered it essential to reflect on how these can be combined. Ontological and epistemological understandings need to be clarified, because the methods are often seen as coming from different and incompatible paradigms (Pring, 2004; Creswell, 2007; Burke-Johnson and Christensen, 2008).

Quantitative methods are most often associated with positivist or post-positivist paradigms, where the ontological view is that there is a single truth or reality, and research results are sought by testing hypotheses, generally using quantitative methods. For example, Hoy and Miskel (2013), in talking about their research in educational administration, maintained that all research must be guided by hypotheses that are empirically checked against observations. Thus, their

approach to ontology was to search for a single meaning, and hence, they used quantitative methods. Greenfield, whose writings were collated and reproduced in Greenfield and Ribbins (2007), also carried out research in educational administration but rejected the above viewpoint. He contended that school organisations were social structures and viewed "organisations and individuals as inextricably intertwined... dependent upon the specific meaning and intention of people within them" (Greenfield and Ribbins, 2007, p.5). Hence, Greenfield proposed (in (Greenfield and Ribbins, 2007) that there are multiple social realities, generally needing qualitative methods to guide research.

Pring (2004) rejected the notion of there only being a single view of reality, which he considered to be a 'false dualism', contending that as educational practice is a complex phenomenon, it cannot be captured by one or the other. He argued that it was the opposition to one or the other paradigm but not the distinction between them that he rejected. He suggested that if there was agreement regarding a certain behaviour, such as 'interaction', then it could be measured quantitatively, and be repeated by others, hence be considered as a single truth. However, he contended that how and why we act in a certain way cannot be understood by observable behaviours alone. This, I propose, suggested that frequency of 'interactions' on their own will not give the full picture. Pring (2004) argued that while we should seek to understand the world using subjective realities, there are "stable and enduring features of reality, independent of us", concluding that "qualitative investigation can clear the ground for the quantitative – and the quantitative be suggestive of differences to be explored in a more interpretive mode" (p.56).

Ercikan and Roth (2006) proposed that research can be incomplete if dichotomising two different paradigms or worldviews and the associated ontology and epistemology, which they described as "qualitative and quantitative and the associated polarization of the "subjective" versus the "objective",, (p.14). Rather than seeing them as separate, with one informing the other, they preferred to view them as a continuum, defined as moving from high-inference to low-inference data. Using the same illustration as Pring (2004), that of 'interactions',

they suggested that 'interactions' can be noted for different types as well as frequency, therefore, having both qualitative and quantitative features. They added that sometimes quantitative data is used only for description; within this, they included the analysis of qualitative data. In these ways Ercikan and Roth (2006) did not see quantitative and qualitative methods of research as "two independent, dichotomous phenomena, as different kinds of things (thereby pertaining to ontology) and different forms of knowledge (thereby pertaining to epistemology)" (p.16).

The notion of a continuum to illustrate ontology was not only used by Ercikan and Roth (2006), but also by Burke-Johnson and Christensen (2008) and Hesse-Biber (2010). Their viewpoints, in contrast to Ercikan and Roth (2006), recognised that different paradigms are distinct and may be seen, by some, as incompatible. Burke-Johnson and Christensen (2008) defined quantitative, qualitative and mixed methods as the "three major research paradigms or research approaches" (p.33), while Hesse-Biber (2010) referred to as "objective" the ontology that "there is a concrete social world", and "subjective" where "social reality is multiple" (p.105).

While Blaikie (2010) agreed with Pring (2004) and Ercikan and Roth (2006) that quantitative and qualitative methods could be used in the same study, in contrast to Ercikan & Roth (2006), he not only made a clear distinction between single and multiple worldviews but maintained that whichever of these assumptions is used at the time must be made clear. Blaikie (2010) added that using both quantitative and qualitative methods, when relying on either a single or a multiple worldview, required considerable awareness of the different assumptions and a capacity to keep the different meanings of reality separate:

> "It is only under these circumstances that most of what has been written about triangulation is relevant... It is not possible to use data related to a single 'absolute' reality to test the validity of data related to multiple constructed realities, regardless of what methods are used in each case" (p.226).

However, Blaikie (2010) considered that it was not necessary throughout a study to be consistent with ontological assumptions but, rather than being used for validation by triangulation, the data collected should be used in order to obtain either a 'convergence' or 'divergence' of views. Therefore, he considered that it was not possible to use one to bolster up the weakness of the other or to use them for triangulation; hence, they should only be combined for complementary purposes. Sale, Lohfeld and Brazil (2002) also concluded that the "distinction of phenomena in mixed methods research is crucial" (p.50).

## 4.4.2. Reflecting on my philosophical position

Logically, as a mathematician, I rejected the use of a continuum to describe different ontological positions as proposed by Burke-Johnson and Christensen (2008). If a choice is between viewing a single truth at one end of a continuum and multiple truths at the other, then what can lie part way between the two? For me, there was logically only a choice of accepting either one truth, or multiple (more than one), or else like Pring (2004) and Blaikie (2010), taking the view that both can be accepted, but only in different circumstances.

I also accepted the ontological understanding in educational research that human activity is complex and cannot always be explained by a single truth or reality. Pring (2004) justified this by explaining that, unlike inanimate objects, people have their individual reasons that lie behind an action. I suggest that this can be extended to opinions, for example, "is it a good school?" Therefore, I consider that a single measurement considered in isolation would not, in such situations, give a useful explanation of what is happening, or why. However, I agree with Pring (2004) that some actions may be measurable to obtain a single result or fact and therefore could also be useful. An example he gave was 'interactions', which is something that I have included in this research. In answer to the proposition frequently made in research that Roma children are ignored by their teacher during lessons, I decided to carry out a

quantitative analysis of comparative frequencies of interactions between teachers and pupils, using the ontological view of a single truth to accept or reject the hypothesis.

Therefore, I conclude that a dualism of worldviews could be used within my study. I agree, however, with both Blaikie's (2010) and Sale *et al.'s* (2002) argument that when using both worldviews, because they measure different aspects, or in Sale *et al.'s* (2002) terminology 'phenomena', it is important that they must pertain to different questions which inform the research rather than be used to help validate a single question. In my research, for example, I decided to quantify differences in absences between Roma and non-Roma children, answering a hypothesis generated by previous research (see Chapter 1) which suggested that Roma children were more often absent than other children. This helped to inform, rather than confirm, an analysis of responses to questions discussed with teachers about whether there were differences in progress, and if so, what they considered to be the reasons. Teachers gave pupil absences as a reason, but not in order to enumerate them.

Having analysed my philosophical position, which accepted the use of both single and multiple worldviews, I next considered this, together with my decision to carry out a case study, in order to determine my own philosophical or paradigmatic methodological approach. I investigated the four 'paradigms' of pragmatism, mixed-methods, transformatory and interpretivism. I rejected the transformatory paradigm, which has a critical theory perspective (Merriam, 2009), hence is dedicated to social change (Mertens, 2010), because the purpose of my case study is exploratory, as I have explained above.

Creswell (2007) contended that pragmatists are not committed to one philosophy, rather considering 'what works' and believe that "we need to stop asking questions about reality and the laws of nature" (p.23). Creswell and Plano Clark (2011), who advocated a 'mixed-methods paradigm', did contend that quantitative and qualitative methods are different strands, suggesting only that the "researcher must simply be explicit in their use (p.45). However,

Lincoln (2010) suggested that "[s]ome mixed-methods models proponents argue that there is not a necessary connection between epistemology and method" (pp.6–7). Neither of the above paradigms were fully coincident with my philosophical position, hence I felt that an interpretivist methodological approach would best suit my research design.

## 4.5. Interpretivism

My interpretative approach followed the ideas of Schwartz-Shea and Yanow (2012), using mainly qualitative data, with quantitative data collected in order to complement and illuminate further the findings. According to Schwartz-Shea and Yanow (2012), interpretative design allows for deductive, inductive and abductive reasoning and uses literature to shape the research by narrowing down the expectation of findings, rather than only as a source for concepts to be tested by the use of hypotheses. Schwartz-Shea and Yanow (2012) also considered that interpretivism did not preclude using quantitative methods if, as Blaikie (2010) also argued, they are not used for triangulation, but rather to address separate questions. Thomas (2011) proposed that an interpretive approach was relevant in case study research:

> "Interpretative researchers assume that the social world is indivisible. It is complex and we should study it in its completeness. In this sense, interpretative research marries easily with case study, which also prioritises looking at the whole" (p.126).

## 4.6. Trustworthiness

Trustworthiness, Schwartz-Shea and Yanow (2012) proposed, should relate to reflexivity, transparency, and intertextuality, in its metaphorical sense, which meant that different types of data, and people with different roles or positions in the research setting should be included in the research. Lincoln and Guba (1985) included, within the need for credibility in naturalistic research, prolonged engagement, persistent observation in the field, and

triangulation, not in its positivist sense of confirming the veracity of a single truth, but rather by using different sources and methods. I propose this sense was similar to Schwartz-Shea's and Yanow's (2010) later definition of inter-textuality. Lincoln and Guba (1985) also included the need for thick description, member checking and analysis of negative cases. The latter guideline, I suggest, may be linked to Yin's (2009) approach, which referred to an openness to alternative explanations. Guba and Lincoln (1989) added peer debriefing and progressive subjectivity, in their suggestions regarding evaluation methods of trustworthiness. These suggestions, I consider, also help the researcher to reflect on their own position throughout the research process. Lincoln (1995) later reviewed further emerging criteria for assessing quality in qualitative and interpretive research that had followed in the decade after she and Guba had given their initial guidelines but cautioned that different criteria may have limited application to a specific study. Therefore, I propose that while I must take into account different methods of ensuring trustworthiness, some may be more applicable to my study than others.

I considered that reflexivity throughout the research process was crucial for my study, especially as I was undertaking multi-cultural research as a British person conducting a research study in multi-ethnic Transylvania. Schwartz-Shea and Yanow (2012) referred to reflexivity as being the researcher's consideration of the:

> "ways in which his own sense-making and the particular circumstances that might have affected it, throughout all phases of the research process, relate to the knowledge claims he ultimately advances in written form" (p.100).

Consequently, throughout this thesis I have striven to make transparent my own position in relation to definitions of concepts, for example, 'discrimination', 'poverty' and 'culture' and the construct 'equal access to quality education', as well as stating the personal lens through which I view the study in the introductory chapter. I strove to clarify my decisions for reviewing particular areas of research for the literature review as well as reflecting upon and

explaining reasons for my methodological choices. I also reflected on how both my own position and meanings of concepts may differ from participants in the research who have very different backgrounds and personal histories from my own. Reflexivity is connected with analysing my own position in the research study and needs to be objective in the way that I consider and analyse my own choices and actions at every stage of the research process, including the analysis, and reporting on my results and their conclusions. Thus, I aimed to ensure that it was the voices of the participants that had priority over any preconceived views that I may have held prior to my fieldwork, as well as considering alternative explanations to hypotheses that I had made and tested, such as whether Roma having fewer interactions with teachers was an indicator of teachers' discrimination of children because of their ethnicity.

I also considered that the need for 'prolonged engagement in the field' was an important part of ensuring trustworthiness, particularly as this was something that had not been carried out by previous research and hence might shed new light on the issue of Roma education. For example, in observing classroom practices, I ensured that I observed complete lessons at different times of the day, week and year and covered all subjects taught in the classes. This helped to "overcome the effects of misinformation, distortion or "presented fronts"" (Guba and Lincoln, 1989, p. 237). Having collected and considered the data from all aspects of my fieldwork, it was also important for me to provide a thick description in order that the reader could judge my interpretation of the findings from as close a position as possible to the evidence. Peer debriefing was also feasible to some extent through discussion with my interpreter(s) following interviews and by checking with them both recorded interviews and my interpretation of meanings as a whole. I was also able to discuss findings with other researchers who were interested in the research.

## 4.7. Data Collection

## 4.7.1. Interviews

Interviews were held with:

- The schools' director (of the two village schools)
- 20 teachers in total, covering the 5 different school departments (3 primary and 2 junior-secondary) and 11 subjects
- 11 Roma families (with a total of 49 children)
- 3 group interviews with a total of 13 Roma children, plus 5 individual interviews with former Roma pupils who had reached at least the final class of junior-secondary school
- 4 members of the local administration (which included an 'honorary' Roma councillor)
- 4 members of the county schools' inspectorate

Interviews had also been arranged with two other members of the local administration's 'education and culture' subcommittee, and another member of the county schools' inspectorate, but they were unable to keep the appointments. The original plan was to talk to an individual parent rather than a family group, but those interviewed at home always had other family members present in the room/house with them, and all those choosing to be interviewed at school brought some of their children. Therefore, family members were involved and usually contributed in some way.

My initial decision to interview the twenty teachers who taught for more than two days each week in the district's two schools followed a discussion with the schools' director and a meeting, at her/his request, to talk to the teachers about my study and how they might be involved. Following the meeting, when all teachers agreed and appeared to be very interested in having a personal involvement in the study, the schools' director drew up a preliminary timetable of interviews for all full-time teachers. Wishing to obtain many different viewpoints in order to immerse myself as much as possible in the school

environment, I was happy to accept this timetable. On interviewing each teacher, I discovered that apart from two primary school teachers, they had diverse backgrounds covering different regions of Transylvania and different schools. I considered that saturation was never reached because in the interviews there were points of view or issues that were only raised by one or possibly two teachers, which would have been missed if they had been excluded from the other teachers who were interviewed.

Families came from three nearby Roma communities within the same rural district or else were part of a main village and had shared these environments throughout their lives. Within each community, the families were closely linked together by being interrelated. I therefore chose families from each of the three communities which had children which covered different ages and who had agreed to be interviewed. Similarly, I selected children from each community representing different ages and levels of education where both children and parents had agreed for them to take part. Administrators were selected if their role was relevant to the education of children in the case study area.

All initial interviews were semi-structured to the extent that open-ended questions allowed participants to have a conversation with me about issues that concerned them. which were not related to the list of questions I had initially drawn up. Miller and Glassner (2004) proposed that the flexibility of a semi-structured interview enabled new issues to be uncovered, rather than seeing the participant as a receptacle of a set of fixed information or knowledge that must be extracted. Semi-structured interviews, Miller and Glassner (2004) proposed, "may provide access to the meanings people attribute to their experiences and social worlds." p.447).

During the interviews an interpreter was also present. I did not give a list of questions to the interpreter to read because it was provided for my use more as an 'aide memoire' to help ensure I had covered etic issues that had come from my reading of literature and from specific aspects of policy implementation rather than a fixed list of questions that must be asked. The lists of questions

were also useful on two occasions (for a parent and an administrator) who insisted on being provided with a list of questions to be asked before agreeing to be interviewed. When participants introduced their own views or topics not covered by pre-designed questions, I continued the interview with a discussion of their concerns, rather than following prepared questions. For example, two Roma parents started their interviews by discussing their need for money in order for children to receive school education. This way, my research was able to be exploratory through exploring etic issues raised by my expectations of a reading of the literature, as well as giving the opportunity and encouragement for emic issues to emerge. Follow-up conversations were less structured, although I sometimes had questions that I wished to ask.

My interpreter also acted as an advocate for the participants, by ensuring throughout that participants were aware that they did not need to answer any questions if they did not wish. He also facilitated the interview equally for both participants and researcher by interpreting between the languages. This way, each interview with adult participants took the form of a three-way conversation and I ensured that the seating reflected the equal status of all, rather than the interviewer and interpreter being on 'one side' and the participant on the other.

The interview was usually translated directly to me at the time by the interpreter, although there were occasions when this was not needed. Romanian, Hungarian and English languages were used, sometimes even within a single interview. Liamputtong (2010) suggested that it was important to realise in interviews that some participants may be very fluent in English and would be more than happy to be interviewed in English rather than their mother tongue. In my experience of twenty years conversing with Romanians whose first language was either Hungarian or Romanian, it was very usual for those whose first language was Hungarian to use both Hungarian and Romanian languages in the same conversation and, when I was included in the conversations, Hungarian, Romanian and English languages were all sometimes used. The participants in my study were all aware that I had a basic command of Romanian

language and several also understood and spoke English well. Most participants were accustomed to talking to me in Romanian on simple matters without an interpreter present. For the interviews, therefore, we used whichever language was the most comfortable for the participant. In one case, the participant chose to speak Romanian but said that (s)he would change to Hungarian if it became too complicated. In another interview, following my introduction spoken in Romanian and the interpreter's initial discussion with the participant, my first question was translated from English into Romanian; however, s(he) answered directly in English. On other occasions when the questions to the participant were very straightforward, I responded directly to the answer, rather than waiting for the translation. For example, when the question was "are you teaching classes 1 and 3 at the moment or classes 2 and 4", the reply was in Romanian "unu și trei" and I directly replied "unu și trei, mulțumesc" (1 and 3, thank you). I felt this was the natural way to respond and that it would have seemed unnatural to the participant if I had not understood and responded directly.

Burke-Johnson & Christensen (2008) maintained that it was important for an interviewer to establish both trust and rapport. When interviewing participants, I used mutual understandings, for example, as a parent and/or teacher, in order to attempt to forge a natural link between us, thus gaining a rapport. The issue of trust was addressed by making the purpose of the interview clear to the participant, and reiterating that what was said in the interview was completely confidential. When interviewing children, Eder and Fingerson (2002) referred to the position of power that an older person had with children, suggesting that children can be more comfortable when interviews take place in groups where they outnumber adults. For this reason I chose to have group interviews with Roma pupils. A small group of children within a relaxed situation, I felt, were more likely to feel comfortable with me and speak about their experiences in a natural way. Although for practical reasons these took place in school, I provided soft drinks and 'nibbles' in order to give the interview an informal atmosphere. The former pupils were interviewed separately as in each case they were older than sixteen.

Pilot interviews were undertaken with two teachers and four groups of children from a school in a neighbouring district, with the help of their schools' director. Although I was known to the schools' director, it had been several years since I had worked with teachers and children in this school. I accepted the schools' director's offer for him to explain the purpose of the interviews to teachers, children and parents and to obtain their written consent.

### *4.7.1.1. Cross-cultural issues*

Liamputtong (2010) emphasised that "instilling trust is crucial in cross-cultural research" (p.97). Eide and Allen (2005) both expanded and extended this idea, suggesting that in 'transcultural' research, three 'conceptual building blocks' are needed: 'context', 'trust' and 'knowing the person'. Within the concept 'knowing the person', they included collaboration with community members and leaders, knowing the community, and being known. Community members and leaders, they suggest, are needed to act as gatekeepers or culture brokers. They suggested that the interrelation between these ideas was needed in order to recruit participants for a research study. While Eide and Allen (2005) specifically related their ideas to interviewing participants, I consider that these aspects are as relevant to collecting information in other ways that involve participants, such as classroom observation, where a teacher's willing collaboration is needed. In these and other situations in fieldwork, I propose that trust and willing participation is central. Eide and Allen (2005) contended that the way of gaining trust in cross-cultural research lay in the researcher's approach, suggesting that "the researchers' humility, cultural sensitivity, and caring contribute to building a bridge of trust among them" (p.48).

As well as obtaining trust, Eide and Allen (2005) highlighted the importance of gaining cultural sensitivity by learning and understanding as much as possible about participants' different cultures, taking this into consideration throughout the research process. This aspect is also highlighted by other researchers (Tillman, 2002; Liamputtong, 2010). Without this understanding, Eide and Allen (2005) considered, responses were more likely to have been

misinterpreted by the researcher; even gestures may have had different meanings in different cultures. My own understanding of the participants' culture was informed by my review of the literature (see Chapters 1–3) and by discussions with my interpreters and others who belonged to the different cultures represented by participants.

Learning and understanding about, and being sensitive to, another's culture, however, is not the same as identifying with that culture. It was also considered important that the researcher is aware of how their own culture could affect both their conduct and interpretation of the research (Ryen, 2002; Milner and Richard 2007; Bhopal and Myers, 2008). For example, Milner and Richard (2007) maintained that:

> "dangers seen, unseen, and unforeseen can emerge for researchers when they do not pay careful attention to their own and others' racialized and cultural systems of coming to know, knowing and experiencing the world" (p.388).

Milner and Richard (2007) contended that cultural or racial colour blindness on the part of the researcher can lead to misunderstanding and hence misinterpreting people of a different race or culture from the researcher. A "seen" danger, he proposed, was in avoiding racial or cultural issues. An example he gave was not acknowledging the prevalence of one race or culture over another in special schools. He also suggested that some discriminatory attitudes may be ignored or negative stereotypes may be accepted by the researcher. In order to counter these problems, Milner and Richard (2007) suggested that the researcher must reflect on their own racial and cultural heritage, thus bringing it to the surface and recognising matters which affected the research study. In terms of representing participants' voices, Milner and Richard (2007) contended that this was essential, so that both the researcher's and the participants' voices were represented in the interpretation and findings of a study.

The views expressed above demonstrated that as well as reflecting on my own culture, which was very different from all other participants in the study, I needed to learn as much as possible about the differing cultures within the

immediate community. Although I knew people from the different ethnic groups in the particular communities, it did not mean that I was fully conversant with their different cultures. As well as learning more myself, the interviews in my research were carried out together with an interpreter who was familiar with the culture of the participant, in order to help, advise and enable me to react appropriately to cultural mores during the course of interviews. Gatekeepers were not needed to obtain access to the potential participants who were teachers and local administrators, because having worked with them over several years, I already had a direct relationship which had been built on trust. Those parents who I knew less well, or not at all, were contacted on my behalf by teachers from each village. The teachers I used for this purpose had, I considered, a good relationship with Roma families.

### 4.7.1.2. Linguistic issues

The participants in my study had either Romanian or Hungarian as their first language or, alternatively, they may have been bilingual (or even trilingual). English is both my mother tongue and the language in which the results will be published, hence this constituted an additional challenge because interpreters and translation are needed (Esposito, 2001; Larkin, Dierckx de Casterlé and Schotsmans, 2007; Pena, 2007; Temple and Katarzyna, 2009). Some teachers who were fluent in English, however, chose that their interviews were conducted in English. Esposito (2001) contended that "misinterpretation of meaning is a potential problem in any research, but the risk grows tremendously when language is a barrier" (p.570). The 'risk' according to Esposito, came partly from the process of interpreting from the source language to the target language, which she displayed in diagrammatic form, illustrated below:

| Raw Data in informant's language | Interpreter coceptualises meaning | Interpreter understands meaning | Interpreter re-expresses meaning | Interpreted translation |
| --- | --- | --- | --- | --- |
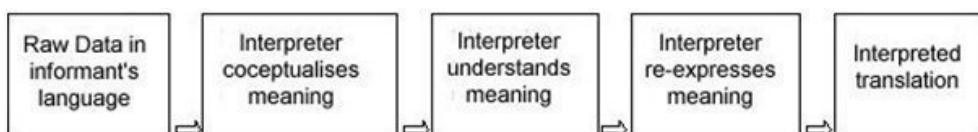
**Figure 4.1.** *Process of interpretation*
(adapted from Esposito, 2001, p.571)

The first three processes, I suggest, are involved in all interviews, including those where the interviewer shares the same mother tongue as the informant. In this case, the interviewer must first conceptualise and then understand what the 'informant' is saying. In qualitative research, Esposito (2001) suggested that it is best if the researcher processes the meaning of responses at the time, in order to adjust questions according to the responses made. In cross-cultural research, where interpretation is needed, an option is to have a 'real-time' interpreter, allowing the researcher to participate in the data collection process at it occurs. This is what I chose to do. The following diagrams, derived from Figure 4.1 above, show the process of question and answer during an interview, firstly when both interviewer and informant speak a common language and secondly when a 'real-time' interpreter is used. These, I consider, illustrate both the problems encountered:
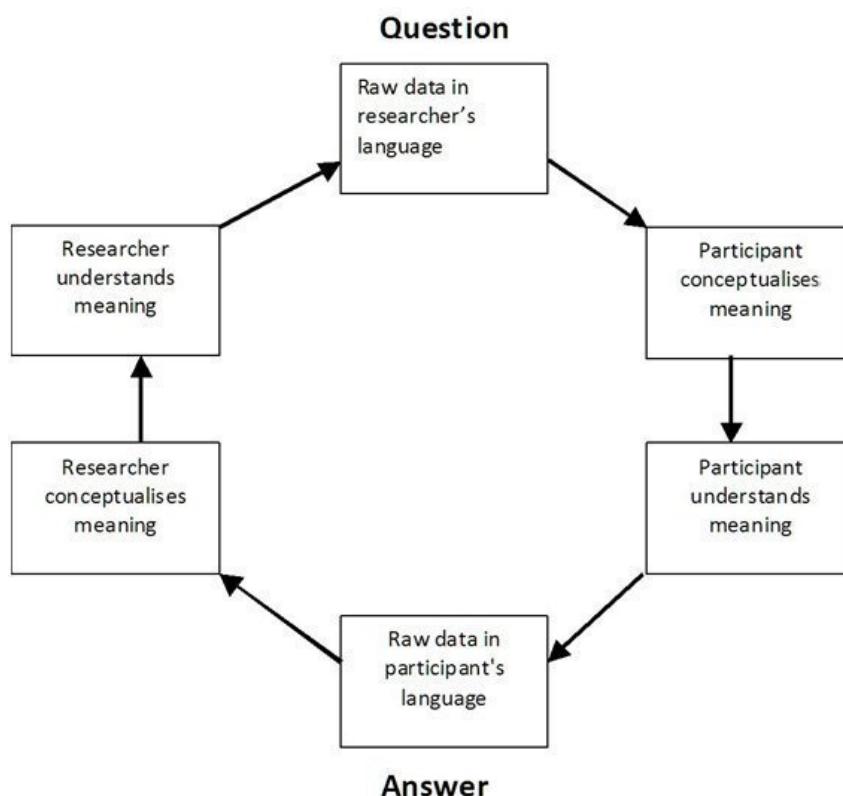


**Figure 4.2.** *An interview where researcher and participant share the same language*

In Figure 4.2, the risks of misunderstandings are illustrated. I propose that misinterpretation may happen at each stage between question and answer.
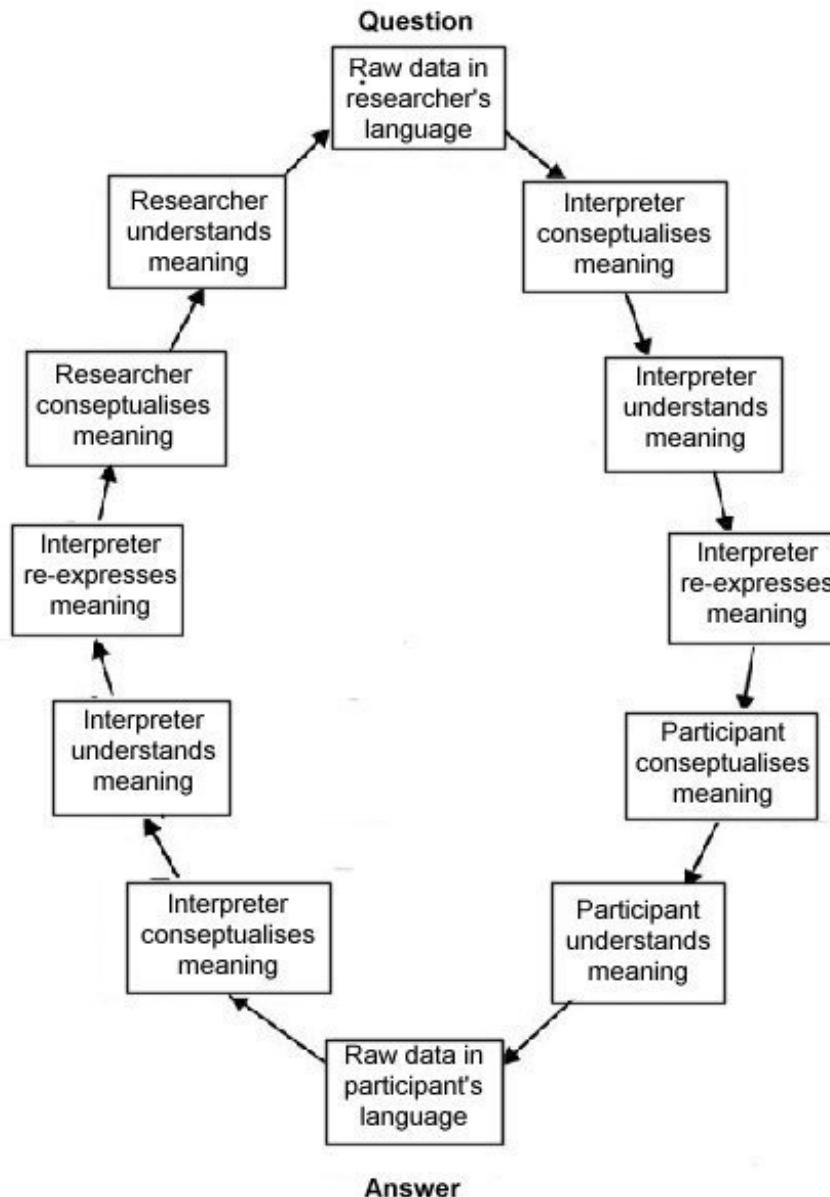


**Figure 4.3.** *An interview where researcher and participant use an interpreter*

As the Figure 4.3 shows, there are many more instances where misunder-standings may occur, compared with when both researcher and participant

speak the same language. Not only was it an advantage to use a real-time interpreter in order to adjust questions according to responses, as Esposito (2001) suggested, but also, I found that it was useful, upon hearing the interpreted answer, to go back and check meanings at the time with both the interpreter and participant, if they were unclear to me.

In addition to considering linguistic issues, it was also important to consider cultural differences (Murray and Wynne, 2001; Edwards, Alexander and Temple, 2006; Pena, 2007). Murray & Wynne (2001) contended that researchers generally do not have the language skills to deal with these, hence "consideration needs to be given as to how we can bridge the linguistic and cultural divide between researcher and participant" (p.2). Both linguistic and cultural differences are highlighted even when considering the wording of the research question, as I referred to in Chapter 3 with reference to the definition of the word policy. Birbili (2000) also considered that there was a need for 'gaining conceptual equivalence or comparability of meaning' as opposed to directly translating a word. She suggested that problems even occur where there is an equivalent 'dictionary' definition; "lexical equivalence might carry 'emotional connotations' in one language that will not necessarily occur in another" (p.2). Through involvement with translations between Romanian and English languages over twenty years, I have discovered many instances of this. One example was in the use of the word exploit, for which the dictionary equivalent in Romanian is 'exploata'. A professional translator in translating a project application from Romanian into English, once referred to the project as wishing to 'exploit children'. The connotation was that the children will be used for a good purpose to benefit them; however, I suggest that in English language the connotation in this context was quite different.

Other researchers involved with translating research material agreed that translation was not a straightforward process. For example, Temple and Edwards (2002) considered that "context is all important in deciding equivalence or difference in meaning", as there "may not be a conceptual equivalence in the language to which it is being translated" (p.2–3). Larkin *et al.* (2007) also

referred to the "dilemma of conceptual equivalence" (p,469), suggesting that a solution could be that the translator becomes a partner in the process. Liamputtong (2010) also concurred, stating that:

> "translators should be involved in the research project more than merely as interpreters or translators of information… They should become 'interpreters, guides and co-researchers'" (p.149).

Accepting the advice given above, that a 'translator' should be involved in the research process, I selected an interpreter/translator who, as well as being proficient in Romanian, Hungarian (the first languages of the participants), and English, was also able and prepared to become involved throughout the data collection and analysis process. This person was brought up in a village community and had two Roma boys as his 'best friends' when growing up. He moves easily within Romanian, Hungarian and Roma communities. He had recently lived for several years in the 'community' that was the subject of the case study, and was well known, trusted and respected there. A second interviewer that I used in schools was a teacher who now works part time for disability organisations. In his current role, he is familiar with interpreting for charitable organisations, both international and from within the country. He was brought up and was also a teacher in a village and therefore communicated easily with both teachers and pupils in schools.

Both interpreters were able to guide me in cultural matters, the first within the village communities and the second within the schools' communities. Therefore, as well as interpreters, they acted as 'culture brokers', a term proposed by Eide and Allen (2005), which described those "who understand and are sympathetic to the values and issues of each of the relevant cultures" (p.50) and who are able to reduce misunderstandings between the researcher and participant. Eide and Allen (2005) used the term to apply to gatekeepers, but their definition of culture broker is also a useful way for me to describe the role of my interpreters within the interview setting.

An understanding that participants' use of language depends on the setting of the interview, as well as on cultural differences, is also essential for

interviewers (Esposito, 2001; Murray and Wynne, 2001; Temple and Katarzyna, 2009). Esposito (2001), therefore, recommended that using a professional interpreter is preferable. A preference for using a professional interpreter is, however, challenged by several researchers, for example Liamputtong (2010), who contended that "in certain situations… professional interpreters may not work well for the research participants" (p.150). In the example she cited, when interviewing new mothers about childbirth and mothering, participants did not want an interpreter who was also a stranger to them. Tsai, *et al.* (2004) also found that professional translators did not always fully understand specific cultural meanings. They felt the need, therefore, to use others as well, who shared the same cultural background as the interviewees. Although Tsai *et al.* (2004) referred to the translation of audio-tape material, I considered that it was reasonable to suppose that the same issues would apply during an interview, if the professional interpreter was unfamiliar with regional or cultural differences. Edwards *et al.* (2006), referring to a case study that used interpreters, found that either a "family member or friend who has professional skills and expertise, and adheres to professional codes of good practice or a professional interpreter… [who] is a familiar person" (p.16) was considered to be trustworthy and hence acceptable for this role. Wallin and Ahlstrom (2006), on the other hand, shed doubt on the suitability of using a familiar person as an interpreter, suggesting that this could raise three problems: confidentiality might not be ensured, the interpreter may be selective in her/his translation out of a need to protect the participant, and the interpreter might even give answers to interviewer's questions without asking the interviewee.

What was agreed, in the differing views expressed above, was the need for an interpreter to be culturally aware and proficient in terms of linguistic differences between cultures, and also that they should be considered trustworthy by the participants. The points made by Wallin and Ahlstrom (2006) also added the need for trust between researcher and interpreter, so that the researcher can be confident that answers are interpreted by accurately reflecting the views of the participant. I considered that the interpreters I used for the research study, as described above, fulfilled these needs.

There are a number of ways explained in the literature about how to undertake and check the actual translation. Whichever method is used, however, Birbili (2000) maintained that "there is a need to be explicit in describing their [researchers'] choices and decisions, translation procedures and the resources used." (p.1). Murray and Wynne (2001) suggested that a way of making it transparent to the reader that data has been translated was to use the third person when referring to what has been said; this made it "continually clear within the research publication that participants' words are subject to linguistic interpretation" (p.11). For my research, which adopted an interpretative paradigm, interpretation was carried out during the interview, as suggested by Esposito (2001) above. The interviews were also recorded, when feasible, and transcribed, so that the transcription both of the words expressed by the participant and the meaning given to them at the time could be checked at a later date. This was done by me together with the interpreter, in order to lessen the chance of any misunderstandings made in the initial interpretation. When notes were taken, we both went through them together as soon as possible after the interview so that we could rely on memory as well as the notes to check meanings. Rather than using the third person when referring either to translations from the interpreter or else direct translations from recorded dialogue, I use the first person for all quotations but indicate when they have been spoken in English, hence are not translated from either Romanian or Hungarian.

### *4.7.1.3. Insider/Outsider status*

Banks (1998) analysed why researchers have in the past, for example, represented slaves as being happy or described African Americans as 'intellectually inferior'. He came to the conclusion that this was because researchers were outsiders in relation to the communities they studied. From this conclusion, Banks (1998) developed a typology of cross-cultural researchers, proposing that someone who did not share the "values, beliefs, perspectives and knowledge" of a community and its culture was considered as an 'outsider', and "consequently often misunderstands and misinterprets the behaviors within the studied

community" (p.8). He concluded that outsider researchers should not only be sensitive to their status within the community they study, but also work with people indigenous to the community who can provide them with accurate knowledge in order to help them to acquire insider status. Liamputtong (2010), writing a decade later, also proposed that there were problems with the researcher being an 'outsider' because they may distort the views of other cultures by comparing them with their own.

Dunbar, Rodriguez and Parker (2002), on the contrary, argued that although the researcher was ethnically the same as the students he researched, their experiences were completely different from his; therefore he 'was a stranger' to their way of life. They contended that it was more important for the researcher to gain the students' trust by letting them get to know him, as opposed to having the same ethnicity. Carter (2005), a white male, in his study of female ethnic minority nurses, also considered that lack of trust between researchers and research participants did not happen because of differences in race and gender. He interviewed 'currently employed' ethnic minority nurses about issues of ethnic identity, racism and discrimination, as well as interviewing retired Afro-Caribbean nurses. The initial difficulties he found in interviews with 'currently employed' nurses, Carter (2005) contended, came from his being viewed as 'a management spy'. He helped to solve this problem by using as a gatekeeper a ward manager who explained to the nurses that he was not a spy. Once this had happened, he found that the nurses discussed the issues with him, although many were concerned about confidentiality for fear of their views getting back to the management. However, when interviewing retired nurses in their homes, he considered that they spoke to him freely about their experiences, making explicit their feelings about discrimination. He contended that, for many of the retired women, the interview appeared to be a welcome opportunity to discuss their lives and that, rather than a sense of 'rapport' being created by people with a 'shared identity', the differences between a male white researcher and black Afro-Caribbean females may have given a "space for respondents to describe and tease out meanings and

assumptions that may otherwise remain unspoken" (Carter, 2006, pp.347–348). Carter (2006) concluded that the problems he had encountered with employed nurses were not of race but of his credibility as a researcher.

Chawla (2006) contended that even a researcher working in their native country amongst people who share their mother tongue was unlikely to be considered by all as an insider. From her experiences in an ethnographic study of urban Indian women in Hindu arranged marriages, she proposed that:

> "whether native or other, we are all 'anothers' in the field, because there will always be facets of ourselves that connect us with the people we study and other factors that emphasize our difference" (Chawla, 2006, p.14).

The participants in her study were from her own community. However, when interviewing different age groups of women, she found her status as 'insider' versus 'other' changed: "at different moments in the field, [she] experienced [her] participants as comrades, as uncomfortable strangers, and as comfortable strangers." (Chawla, 2006, p.15).

The researchers' experiences, related above, suggested that being an 'outsider', was not necessarily about belonging to an ethnic group or culture, but consisted in how the researcher both made the connection with and was trusted by participants. Carter (2006) also argued that provided that trust was gained, being an outsider was an advantage because meanings would be more fully described to an outsider. Therefore, I conclude that being an 'insider' in terms of culture and ethnicity may be less important to the outcome of a research than understanding the many factors which both link and separate the researcher and researched. This directly relates to Milner and Richards' (2007) advice in the previous section, to reflect on one's own heritage. However, I propose that this should be extended to include other life experiences such as those described by Dunbar *et al.* (2002) and Chawla (2006). The issue of trust, raised here and also raised in the previous section, was one I also found to be of great importance. I felt that I had achieved this with at least two parents and a teacher who thanked me following my interviews with them, because I

had listened to their points of view. One parent asked me to write a 'big book' about the situation of Roma so that I could let everyone know their views.

## 4.7.2. Classroom observations

My research question included practices concerned with implementation of the 'policy'. I considered that a significant part of such practices would involve the process of teaching children in a classroom situation. O'Sullivan (2006), asserted that:

> "lesson observations can illuminate teaching and learning processes and indicate the quality of education taking place at the chalk face. They can also highlight the realities within which teachers work and which practices can be effective in these realities" (p.253).

I made classroom observations of all the classes that included four or more Roma children. This totalled 103 lessons, each fifty minutes long. I considered it essential to make sufficient observations in order to elicit whether or not the observations that I undertook were typical in the many different situations of the schools such as different ages of pupils, the different subjects taught, in the two different villages and the two different languages. I also needed to ensure that I had a sufficient number of classroom observations in order to collect quantitative data that could be tested for significance. In the three primary school departments, there were four lessons each day, while in the two secondary departments children usually had five lessons each day. Observations were made over three different times of the year, on different days in the week and in every subject taught, thus providing prolonged engagement in the field.

I explained to teachers that my observations focused on what was happening with regard to the education of Roma children. I received positive responses from all the teachers about my requests to observe their lessons, which meant that I had no problems with access, although immediately before observing each lesson, I always reconfirmed with the teacher that it was a convenient time for them.

I used both quantitative and qualitative methods, with opportunities for teacher input after the lesson in order to explain whether or not they considered that the lesson was typical etc. This way (s)he was given the opportunity to explain things that I may not have realised because I was not as familiar with the particular pupils and their class routine. Also, I thanked them afterwards and commiserated with them and reassured them when, for example, they explained that the class had been particularly unruly during that lesson.

Quantitative observations were used to test the hypothesis that Roma children were ignored in lessons, which I had derived from the literature discussed in Chapter 1. I instrumentalised this using the null hypothesis that there was no difference in teacher interactions with Roma children compared with non-Roma children, with the alternative hypothesis being that there was a significant difference. Not all lessons were quantifiable in terms of teacher interactions with pupils, for example informatics and sports lessons, where teachers were interacting with groups of children rather than with individuals or else it was not possible to keep an accurate check on interactions with particular children. This meant I needed to ensure that there were sufficient lessons for each class that were quantifiable in order to test the significance of the hypothesis which compared the difference in numbers of interactions by teachers with non-Roma as opposed to Roma children. I used methods adapted from previous research by Yepez (1994) and Duffy, Warren and Walsh (2001), which compared the difference in numbers of interactions between teachers and pupils of different gender. Both Yepez (1994) and Duffy *et al.*(2001) used or adapted the INTERSECT method, devised by Sadker, as described in Sadker, Sadker and Bauchner (1984). This method quantifies and analyses both the number and type of classroom interactions between teacher and pupil.

Sadker *et al*. (1985), cited by Yepez (1994), stressed that "interactions must be observed and quantitatively coded" (p.124), based on the theory that subjective judgements made by observers may be incorrect. Yepez (1994) gave an account of an experiment Sadker *et al*. (1985) carried out to test this theory. Educators viewed a film of a lesson and were asked whether females

or males talked more. The educators had thought that females talked more, yet the objective evidence showed that the males had talked three times as much. I also use an adapted form of INTERSECT, collapsing the categories to three: 'teacher praise for good work', 'neutral interactions' and 'teacher admonishing student' (see Appendix 3). The observations involved careful judgement on my part regarding, for example, what constituted a negative response of admonishment. Estacion, Mcmahon and Quint (2004) noted that two researchers, observing the same class, had quite different results on some issues, in particular, showing different tolerance levels towards behavioural issues. Although I was the only one observing lessons, I also needed to ensure consistency in distinguishing between the three categegories. The null hypothesis that there was no difference in numbers of teacher interactions with Roma children compared with non Roma children was tested using Fisher's two-tailed test for significance and in the cases where the null hypothesis was rejected, data was also illustrated through bar charts which showed the mean number of interactions for each lesson for Roma children compared with non-Roma children.

Qualitative observation was used as well as quantitative because I considered that the quantitative measure of 'number of interactions between teacher and pupil' did not give a full account of a lesson. For example, frequently it was not the main focus of a lesson, as children spend some time working on their own without any interaction from the teacher. It was also important to know to what extent all children were engaged in learning. Such issues were observed by qualitative methods. Merriam (2009) described a range of structures that could be used in qualitative classroom observation. Certain aspects or events could be decided on in advance, while other unexpected events may occur during the lesson. My structured approach was informed by my training and experience as a teacher's mentor in Britain, where I assessed lessons for their quality in order to give feedback to teachers. This approach was able to provide me with both positive and negative evidence regarding classroom practices relating to the realisation of the 'policy'.

I sat at the back of the classes in order to be as inconspicuous as possible, as my aim was to have as neutral effect as possible on each lesson. However, my presence in the class was obvious and there were a few interactions with me, initiated by pupils or teachers during lessons. To this extent, I was a participant observer. Such interactions were all entered into my observation record so that I could take account of them during analysis.

### 4.7.2.1. Reflecting on my presence as a researcher in the classroom

For most teachers and some children, I had been a familiar presence in the schools. This was evident when the schools' director introduced me to a junior-secondary class and was met with a chorus of "we know "Doamna" Rosa". I always sat at the back of the classroom so that I would not disturb the lesson but could observe what the children were doing. Occasionally, a child would turn around to look at me, so, if we had eye contact, I smiled and indicated that they should turn back to face the front of the room, which they always did. In the junior-secondary classes, I was always made welcome by the children, for example, at the beginning of the day they would ensure that I had a good chair to sit on (many chairs were in a poor state of repair), and on one occasion after a lesson break I returned to find they had left me a drink and some sweets. I was therefore by no means an 'invisible observer', but I considered that the only occasions when this impinged on lessons in the junior-secondary school was if a teacher addressed me, for example in a Geography lesson when talking about the climate of the UK, and I was invited to confirm what (s)he said, and also when two teachers, on occasion, talked to me about the children during lesson time. There was only one other incident, in a lesson where more children than usual were present so that there was no completely free desk at the back of the class. I went to an empty seat at the back and asked the Roma boy sitting at a double desk if I could sit beside him; he readily gave his permission. When the teacher arrived, (s)he instructed the boy to move forward to sit beside a girl. I indicated to the teacher that I was happy with the situation, but the teacher insisted that the boy move. Instead,

he quietly took his possessions and left the room. He did not appear at any other lesson that day. When I spoke to his class teacher later, (s)he suggested that he would not have liked being treated as a child by a female teacher who gave him the instruction. This was not unusual behaviour, the class teacher told me, for teenage Roma boys.

In primary departments, especially in one class where the children knew me well, a Roma child who was in the 'non-curriculum group' (a group of children who were not being taught the curriculum which was required for the year group) would come and show me her/his work, especially if the teacher was busy at the desk attending to others and had sent the child away in order to deal with the curriculum groups. On these occasions, I did look at the work and, on request, would write the child's name so that (s)he would be able to copy this. The teacher was very happy for me to do this. I had decided that to show interest in a child's work would be less disruptive than to reject an approach to me. In another lesson where the children had a group activity involving a 'conga' like song and dance, I was invited to join in, which I did. In all school sections my presence was obvious but, I considered, almost always unobtrusive.

As there were frequent changes to the timetable, because of teacher absence or lessons being suspended for teacher meetings or free school days (saints' days and eight government-imposed free days for public servants), I had to make changes to my original observation schedule. Even when I requested to observe a lesson a few minutes before it started, no teacher refused my request. I felt it unlikely, therefore, that the content of lessons was specially prepared, although it was not possible to know whether pupils and teachers modified their behaviour because of my presence.

### 4.7.3. Field notes

Silverman (2005) defined 'field' as the setting or the place where ethnographic research took place. Using this description, I included relevant observations

made by me within the self-administered district studied. Field notes included visual observations made in and around the setting of the schools and the homes of the Roma families that I visited, as well as relevant verbal opinions expressed directly to me by others.

## 4.7.4. Collection of documents and quantitative data from school records

Documents and school records collected included data on absences and attainment from school records and the syllabus of an INSET course for teachers entitled "A school for all", which concerned the inclusion of Roma children. I was also provided with a paper on the inclusion of Roma children, written by the schools' director.

The schools' director had allowed me full access to the school's records, however there were problems involved in collecting data on pupil absences. One village at the start of my study had both a primary and a junior-secondary department and was the only school to have a sufficient proportion of Roma to non-Roma children to be able to make statistical comparisons. However, I discovered that no records of attendances (or absences) were available for the primary department, nor for one class in the junior-secondary department. In the following year, the primary school teachers agreed to keep a daily attendance record book specifically for me; hence, attendance records were analysed over separate years for primary and junior-secondary departments.

Attendance data were used firstly to compare the number of absences of Roma children with non-Roma children. These were illustrated by scatter-grams and tested for significance using the Mann-Whitney U test. The second purpose was to compare the number of absences with different types of weather. Fisher's two tailed test was used to test the significance of the results (see Appendix 7).

## 4.8. Ethics

The research followed guidelines provided by the British Educational Research Association (BERA, 2018), however in cross-cultural research in particular, further issues need to be considered, as highlighted in earlier subsections of this chapter. For example, there was a much greater need for cultural sensitivity both between myself and participants and between the different cultures represented in the study, who may hold stereotypical views about the other cultures. It was also important not to allow others' views of different cultures cloud my own interpretation of issues raised by participants but to recognise that each person has their own individual view of the world. The way of increasing my own cultural sensitivity both before and during interviews has also been discussed above. The ethical challenges were also much greater when interpreting from a different mother tongue than my own, or even when participants chose to use English language. Conceptual equivalence between two people always raises challenges with accurately interpreting meanings from the spoken word; hence, when there is no need to translate from one language to another, the reader can elicit meanings for themselves by reading direct quotations. However, when the spoken word needed first to be interpreted into a different language, the reader needed to rely on the meanings understood by the interpreter. For this reason, I not only took extra measures in ensuring as accurate a representation as possible but also made it clear to the reader whether or not I used a direct quotation, or one that had been interpreted.

Obtaining informed consent in cross-cultural research was also referred to by Adams *et al* (2007) and Liamputtong (2010). One issue related to the problems arising when some participants are not sufficiently literate to be able to understand explanations provided in the required information sheets or consent forms. For example, Adams *et al*. (2007) acknowledged the fact that "informed consent protocols are not necessarily transferable across cultural, national or ethnic groups", hence they recognise a need "for balancing ethical universals with practical and local conditions" (p.445). Adams *et al*. (2007) also found

in their research that there were particular problems where a potential participant was illiterate. They decided that it was important to spend time ensuring that all participants fully understood the implications of the research and the voluntary nature of their participation. This view was reflected in Liamputtong's (2010) account of cross-cultural researchers who "argue for more emphasis on trust building, reciprocity and rapport rather than the mechanistic approach of securing consent" (p.50). Liamputtong (2010) also raised the question of signed consent, particularly, but not exclusively, from illiterate participants, because "written consent can be intimidating to many cultural and ethnic groups" (p.45). I discussed these issues with my interpreters who spent time, prior to the interview as well as during an interview, ensuring that each participant understood, especially in the situations where Roma parents were illiterate, and ensured they understood when they signed the consent form (sometimes with a mark rather than a signature).

With reference to the difficulties of securing signed consent from otherwise willing participants who were Cambodian, Laotian and Vietnamese refugees living in Australia, because of their fears that the communist Vietnamese regime may be able to trace them, Liamputtong (2010) stated:

> "I had to explain clearly that the signing of a consent form was something that would protect them, not jeopardise them… it is better that we explain it again before we ask them to sign" (p.46).

She considered that the particular problem in the research described above was because of their negative experiences of having previously lived under communist regimes. Liamputtong (2010) concluded that "the ability to carry out research can be jeopardised if the process of gaining consent is done insensitively" (p.46).

As related in Chapter 1, those who were educated in schools during the communist era were expected to adhere to a single viewpoint, that of the communist doctrine. Expressing any other view could have serious consequences, and many people feared not giving a 'right' answer (Shimoniak,

1970; Dumitrana, 2001; Rado, 2001). Twenty years later the effect of communist teaching may still cause a tension that might not be seen by 'western' participants in a research study. The tension or fear of not giving the correct answer could apply both when giving consent and during interviews. When considering interviews with participants, Gubrium (2002) contended that even in the western world, interview research was a relatively new thing until after World War II, when:

> "it became feasible for the first time for individuals to speak with strangers about all manner of thoughts concerning their lives, because these new strangers (that is, interviewers) didn't tell, at least in personally recognisable terms" (p.4).

I contend that it would be more than forty years after World War II, after the overthrow of communism, before people in Transylvania gained the freedom Gubrium (2002) referred to above. Roma communities have, in addition to a communist background, a history of discrimination, as outlined in Chapter 2, which also needed to be considered by both me and the interviewers (who had themselves been brought up under a communist regime).

Unexpected issues may also occur during the conduct of data collection, particularly in case study research, where there may be greater contact with participants than, for example, in a survey. Thomas (2011) underlined this when explaining how to carry out case study research, stating that it is "especially important to consider ethics in case study research since you may be very closely involved with the research participants" (2012, p.68).

Gaining informed consent from children is a further ethical issue that needs to be carefully considered. Eder and Fingerson (2002) referred to the power differential that is associated with age, advising that children are more comfortable when they are interviewed in groups. In their research, David, Edward and Alldred (2001) contended that as well as ensuring children understood and were able to give informed consent, they had to ensure that they were aware that there was no pressure on them to participate, and that there

would be no penalties for those who chose not to consent at any stage. I incorporated Eder and Fingersons' (2002) advice relating to interviews, together with the experience of David *et al.* (2001) given above, to ensure that children were freely able to discuss information about the research and its purpose together in a group with a teacher to whom, I considered, the children both related well and trusted. The teacher also gave them assurances that they were under no pressure to participate and there would be no penalties if they chose not to. Only the parents of children who wished to participate were then contacted, to decide whether or not they wished to consent to their child's participation. Interviewers also emphasised during the interviews that there was no need to answer or remain in the interview if they did not wish to.

During data collection within a school environment, as well as ensuring and reminding all participants, both children and adults, that they can withdraw their consent at any time, there can be occasions when ethical decisions must be made about whether to intervene, rather than just observe a situation, even though this may harm the integrity of the research. Nind *et al.* (2004) gave examples in their paper on this when observing 'inclusive' lessons in a school. They related:

> "We had responsibilities to the teachers who were placing trust in us and to the children who had the least power in the situation. These methodological tensions were not just rhetorical matters for philosophical debate, they were brought sharply into focus during the fieldwork" (Nind *et al*, 2004, pp.265–6).

Before and throughout data collection, especially in cross-cultural research, care must be taken to ensure that no individuals or groups are put at risk. This meant, as described above, that it was important to be as culturally aware as possible and consider the research from all angles and different possible points of view. Liamputtong (2010) contended that "research can only be justified if the outcome will benefit the community rather than further damage it" (p.32). In the context of my research, which focused on a Transylvanian rural community, one risk which could potentially cause harm

was that the participants might have had unreal expectations about the direct benefits that they may enjoy as a consequence of being interviewed. This could cause damage through the disappointment suffered if the anticipated help either for parents and children or for teachers was not forthcoming. Participants, therefore, had to be made clearly aware of the purpose of the research. This I provided in the information forms supplied to participants. The information given needed to be understood before consent to participate was requested; therefore, for the research involving an interpreter, they played a crucial role in this.

In writing any final reports, issues of ethics were reconsidered to ensure that all assurances given to participants were upheld, and also that the report contained nothing that could harm either the participants or the community studied (Liamputtong, 2010). Maintaining confidentiality in the context of my research meant not writing or making reference to information that could identify the community, other than as a self-administrating rural district in Transylvania. Within the community, individual parents, teachers and children are not identified or described in a way that made it possible to identify them by other participants or members of the community. Where exceptions occurred, for example, in using the title of the mayor or schools' director, I checked with them that I had their permission to report what they said under their official title.

## 4.9. Data Analysis

Braun and Clarke (2006) maintained that thematic analysis was a method that was flexible and independent of theory and epistemology, which "through its theoretical freedom can potentially provide a rich and detailed, yet complex account of data" (p.78). In describing their method of, and approach to, applied thematic analysis, Guest, MacQueen and Namey (2012) proposed that "its primary goal is to describe and understand how people feel, think and behave within a particular context relative to the specific research question" (p.13). Guest *et al*. (2012) also suggested that its greatest strength was being able to

use "whatever tools might be appropriate to get the analytic job done in a transparent, efficient and ethical manner" (p.18). My case study analysis involved both qualitative and quantitative data in order to study a small but complex system of education in a rural district of Transylvania. Therefore, I considered that thematic analysis was a useful way to organise and elicit important issues raised by the data and to ensure that data were sufficient to address my research questions.

## 4.9.1. Coding data and identifying themes

I used NVIVO 8/10 to record and code my data in order that it could be easily accessed for the purpose of analysis. In order to identify themes, I followed broad guidelines described by Guest *et al.* (2012), using data collected from my fieldwork. When data are coded and in developing themes, Guest *et al.* (2012) stressed the importance of frequently referring back, both to the original source (rather than relying on summaries) and also to my research questions and structured questions asked in interviews. I also found Braun and Clarkes' (2006) step-by-step guide particularly useful in developing codes that were not based only on specific questions asked, and how, following coding, to develop initial themes. When analysing all forms of data, as Yin (2009) advised, rival explanations were sought.

Having developed and collated codes using the categories 'perceptions of policy', 'discrimination', 'absences' and 'poverty', it became obvious that the categories of 'absences' and 'poverty' were cross-cutting themes, hence not mutually exclusive, which is a necessary condition for thematic analysis (Guest *et al.*, 2012). From the categories, I then developed six mutually exclusive themes which were then further refined to three themes. The first of these, 'perceptions of policy', related to the first research sub-question. The second and third themes, 'practices and their effects within the schools' and 'factors considered to be more important than school' related to the second research sub-question. Please see Appendix 5 for details of themes and their associated codes.

## Conclusions

I established the initial research question before considering the optimal methodology for my study as described in this chapter. The first methodological decision I made was to undertake a single case study. This enabled me to explore what was happening in thick detail, for example, by eliciting views of stakeholders over a two-year period and combining these with lesson observations within the same district. Thus, the case study could add depth to information provided by other studies. I chose one of the districts that was familiar to me and where I was a familiar face to many participants. Following this I considered that I needed to collect both qualitative and quantitative data hence, having reflected on my philosophical position, I decided that an interpretive approach would be best suited to my needs. Data collection methods then were decided upon; however, throughout, important consideration needed to be given to reflecting on how cross-cultural, linguistic and insider/outsider issues needed to be taken into account. Thematic analysis provided an optimal solution for me to organise and elicit issues that were raised in the data and to focus on answering the research questions that I had posed. Throughout the design, data collection, analysis and completion of the thesis, ethical issues, were also an essential part of my methodological considerations.

# CHAPTER 5. Perceptions of the policy

This chapter addresses the first research sub-question:

*What are the stated perceptions of the county school inspectorate, local council administrators, teachers and parents of the policy to achieve equal access to quality education for Roma?*

The policy was determined by the government, who then informed county councils and county school inspectorates who were responsible for its implementation in schools and Roma communities. Implementation could also be carried out by community-based projects, partly or fully funded by international organisations such as PHARE and UNESCO (MPI, 2001; MER, 2003). 'Policy' instructions and explanations were modified over the ten-year policy cycle (see Appendix 2) and could be accessed through the internet by looking up government legislation and MER ordinances. However, access to the internet for most participants was very limited. The schools only had access to the internet in the schools' director's office, few teachers and no Roma families had personal computers. All participants were informed in advance of interviews that my research related to the policy of 'equal access to quality education for Roma children'.

I begin the chapter with a description of the participants and their roles prior to analysing perceptions. In order to help ensure confidentiality, I use gender neutral words when referring to participants, identifying them either by their role or in the case of teachers, with a letter prefixed with "T", in the case of parents, prefixed with "P" and in the case of former pupils, with the prefix "FP" followed by a number. I use italics to denote questions asked, or comments made by me during interviews.

# 5.1. The Participants

## 5.1.1. County School Inspectorate

I interviewed the chief and a deputy chief school inspector and two inspectors with responsibility for Roma issues. All had been teachers both before and during 'policy' implementation but had only held their administrative posts for two years or less at the time of my interviews. I had first met the chief and a deputy chief school inspector prior to starting my fieldwork (when both had been newly appointed), in order to obtain permission to visit schools, interview teachers and pupils and to observe lessons. They appeared to be very interested in my research and felt the results would be very helpful for them. The chief inspector not only gave me the necessary permission for the case study but also invited me to visit any school in the county, suggesting several that he considered had known difficulties with Roma children. In a later interview the following year, s(he) told me that the role of the 'county inspectorate' was:

> "in the main to apply ministry policies and to follow orders and directives, but we have autonomy in order to put them into practice at county level, that's why every county is different because they interpret policy in their own way".

The two Roma inspectors interviewed described their roles differently. The first explained that:

> "I have responsibility for Roma projects like 'second chance' and 'Roma mediators' and [also] school attendance".

The above accorded with the government policy strategy of "stimulating Roma participation in… [education]… based on involvement in sectorial assistance and community development projects" (MPI, 2001, p,4). S(he) also told me that s(he) had visited all schools with Roma pupils. The second, who held the post after the first Roma inspector, told me that her/his role was only to visit schools that had projects for Roma but also:

> "to deal with educational problems like organising the teaching of Roma language and to meet parents who came to her/him with [their] problems".

This inspector did not want to answer any questions directly about the 'policy', offering to reply later by email. This did not happen, and when I next visited Romania three months later, s(he) no longer held this post. However, in the interview, s(he) was prepared to answer specific questions about her/his role in the inspectorate.

## 5.1.2. Local Council Administrators (Primaria)

The Primaria had overall responsibility for school buildings and could supplement the schools' budget by applying for county grants for specific projects, for example, the provision of a Roma mediator or the upgrading of the schools' hygienic facilities. Interviews took place with the mayor, who was also on the schools' governing board and leader of the local council's "education, health and cultural commission", an elected councillor who was also a member of the aforementioned commission and an unofficial Roma representative to the local council. I observed that the mayor made frequent visits to the schools and maintained regular contact with the schools' director. I also interviewed the department's social worker, who was in contact with all Roma families and had responsibilities for assessing and advising about social payments, as well as dealing with other social problems brought to her/him by residents of the two villages.

## 5.1.3. Schools' director and teachers

The schools' director had held such a position before the beginning of the policy. S(he) and all except three of the other teachers interviewed had had experience in teaching in other schools in Transylvania. All but one had at least eight years teaching experience, and all had been educated under the communist regime for at least part of their schooling. Two teachers had recently received a

teaching degree, one of them having had previous teaching experience as an unqualified teacher.

### 5.1.4. Parents

I interviewed parents (two fathers and nine mothers) from eleven Roma families, representing 49 children who are or were of school age during the ten years of 'policy' implementation. The parents represented three different Roma communities as well as Roma living in a main village within the local district.

## 5.2. Policy related to attending schools

Encouraging attendance at school for Roma children was considered an essential part of the 'policy' by both senior inspectors who agreed with that they tried to ensure that all children attended school until they were sixteen. The chief inspector told me that:

> "it is the class-teacher's responsibility to ensure attendance. They can wait 3 years for a child to enrol and tell the inspectorate [if the child does not], then he [the child] can go to the 'second chance' [project].
> It is good for those, for example, who live on the top of a mountain – at the moment they may stay at home and lose their life [chances]".

Although the Education Act in force at the time (Romanian Government, 1995) put the responsibility for school enrolment and attendance on the parents, these inspectors did not appear to blame either the parents or their children for non-attendance, stating, rather, that it was the responsibility of the school.

The first Roma inspector also told me that the county had a 'second chance' project, financed by PHARE (for children older than junior-secondary school age who had abandoned school, who could, on a voluntary basis, attend lessons held in the evening and at weekends). S(he) showed me the details

on a spreadsheet giving the places where 'second-chance' courses were held and the register of those attending each course, telling me that:

"not many complete the course – it does not work well".

In reference to my question: "*What about other aspects of the policy for equal access to quality education for Roma?*", (s)he referred to the legislation outlawing segregation, also telling me that:

"five schools have become integrated following this law, but we still have a problem with one school. We have referred this to the national government department which deals with these situations.
No other schools have problems with integration and we have no other problems with Roma children in the schools. By my estimate nine out of ten [Roma children] abandon school before completing class 8 [junior-secondary school]".

(S)he provided me with statistics, which (s)he had estimated, in support of this (illustrated in Table 5.1 below).

**Table 5.1.** *Proportion of Roma compared with non-Roma*
*children attending schools in one Romanian county in 2007/8*
(*source:* School Inspectorate, County Education Dept)

| School section | primary | junior secondary | Secondary |
|---|---|---|---|
| Proportion Roma | 23% | 7.5% | 0.7% |
| Proportion Non-Roma | 77% | 92.5% | 99.3% |

Despite the evidence of dropout given to me (above), this inspector told me that there were no other problems with schools apart from integration, whilst both senior inspectors agreed that trying to ensure that all children attended schools was part of the policy. This displayed a divergence of perception of the 'policy' within the inspectorate by those having responsibilities for the education of Roma children, because after relating some problems, the above Roma inspector told me that there were no further problems, then told me that not many Roma complete schooling. This was in opposition, I consider,

to that of encouraging attendance, part of the policy considered essential by the two senior inspectors above.

The second Roma inspector told me that s(he) was unaware of any local statistics regarding attendance, but said:

> "In Romania I believe that there are not many Roma children who do not attend school".

This demonstrated a lack of continuity of information between two successive Roma inspectors with respect to information about attendance.

The mayor, who was in charge of the Primaria, told me with reference to the 'policy' that:

> "[there is] legislation banning segregated classes – we do not have them… I talk to the parents at the opening of the schools each year and at school events and encourage them to send their children to the schools where all in the community can be taught together".

I had previously attended two such events and was therefore able to confirm the latter through personal observation. At the events s(he) spoke about the community being one, saying that it was important that we kept the community together in the village school. However, I consider it important that s(he) appeared only to know about this one aspect of the 'policy'.

The discussion was interrupted because there was a queue of people waiting to see the mayor. When the meeting resumed, s(he) told me that s(he) was also concerned about the poor attendance of Roma children at school and felt that this was because Roma people needed to be better disciplined. The reason given for poor attendance demonstrated that s(he), unlike the senior school inspectors, blamed Roma for this.

The County Council's role was to have informed the mayor about the need for schools to be integrated and the mayor had not only ensured that this had been done but also spoke about its benefits to parents. Any problems of poor

attendance of Roma children were likely to have been discussed between her/him and the schools' director, who told me that:

> "the mayor or someone delegated by her/him from the council is on the [schools] board – in this case it is the mayor because s(he) always likes to know about everything that is going on" (schools' director) *(gender neutral words inserted by me).*

On the above evidence it was not possible for me to know whether or not the mayor considered that attendance of Roma children was included as part of the 'policy' or else her/his personal concern based on her/his knowledge of what was happening in the local schools.

The schools' director, when discussing the 'policy', told me that:

> "the policy is about having an inclusive school and that means that it must include Roma children".

I reminded her/him about my first visit to the school (in 1998) when we visited each class in one of the two schools and s(he) showed me a class which was only for Roma children. In more recent visits, I was aware that all classes in both schools were integrated. I asked when the schools had been fully integrated; s(he) told me that it happened in 2002. In our discussion about the policy, s(he) made no direct reference to encouraging school attendance.

Integrating Roma and non-Roma children by allowing them to attend the same school and/or not being discriminated against were seen as part of the 'policy' by some teachers. For example:

> "I think that all the time the ministry of education provides the condition for them to be integrated" (TT).

And another:

> "I know [the policy] it means this thing to me that they have access like any other child.
>
> *So they are able to come to school?*

That it is integrated the stuff and not discriminatory segregation" (TD).

And another:

> "I believe [it means that] it is only to get Roma children to come to school with equal conditions like the other children" (TA).

These teachers linked the 'policy' to the provision of integrated schools and classes, and thus that it provided equal access to all schools.

In contrast, another teacher provided a different emphasis:

> "They mean to – to make them er come to school but er...*(pause)* not to go without school" (TZ).

I have provided a word-for-word translation of the above in order to illustrate the difficulty this teacher seemed to have in framing what s(he) felt the policy meant. Also, the verb "to make" needs more explanation because it has a much broader meaning in Romanian than in English. It is not as strong as 'to compel' but neither does it mean 'to encourage'. The nearest English equivalent in this context is 'to get' them to come to school, which could convey either encouragement or compulsion. Therefore, I consider that the teacher knew that the policy was about increasing attendance of Roma children, but did not refer to either integration or not being discriminated against. Only one parent interviewed appeared to me to feel certain about what the policy meant:

> "Yes I know the policy and know about the special places reserved for Roma children in High School… it means that Roma can choose which school they can go to" (PC).

Although the "special places" referred to related to a policy relevant to older children (in High School or University), equally it might provide encouragement for children to attend, hence this parent accurately reported an element of the 'policy's' strategy, related either to encouragement to attend school.

## 5.3. Policy relating to teaching Roma children

Within the school inspectorate the first Roma inspector told me that:

> "nine schools [in the county] have a Roma mediator, at first financed by PHARE but now by their local Primaria".

Roma mediators were based in a school and were intended to provide an interface between the school and home (NAR, 2008), thus were designed to help facilitate teaching within the school. The above project was specifically related to the policy's strategy to train and provide Roma mediators in schools. The second Roma inspector told me her/his role was to visit schools that had projects. This would have included the nine schools with Roma mediators and any other projects that formed part of policy strategy. Therefore, although unwilling to talk directly about the policy, s(he) would have had some involvement with policy implementation. I was volunteered no information from any members of the school inspectorate interviewed about how the policy was designed to improve the teaching of all the Roma children attending school within the county.

On the other hand, within the school community, helping Roma children who attended school appeared to me to be a key part of the schools' director's perception of the policy. In order to elaborate on what the policy meant, rather than discussing it with me s(he) decided to allow me to have a draft copy of a paper that s(he) had co-authored, entitled "Inclusive Education and Inclusive Schools". As I was unable to get permission from the co-author, and nor has the paper been subsequently published I have not provided the translation of the paper in an appendix; therefore, I provide only statements of the key points which related to the teaching of Roma children:

- Ensure the quality of education to meet a greater diversity of children, with the service adapting to the needs of the children and not vice versa
- In educating children, accepting diversity and cultural differences
- Including children from all ethnicities so they do not feel marginalised
- Identifying and removing all barriers to participation

S(he) also referred to the specific strategy of providing extra help for Roma children if needed, telling me that:

> "we should have extra help with teaching for children with learning difficulties and there are at least twenty children who could benefit. I applied for this thing to the Inspectorate but they did not have money for it" (schools' director).

The paper, which was intended to give me the schools' director's perception of the policy, referred only to general principles of inclusive education. Reference was later made by the director on one policy aspect which s(he) wished to implement within the schools but was not given the resources for by the inspectorate, suggesting that the policy was compromised on this aspect through a lack of available funds within the county. S(he) did not elaborate on any policy strategy which had been implemented by the schools under her/his direction.

Other teachers answered in general terms about the part of the policy that related to teaching Roma children:

> "Yes I have heard about it [the policy] but this is what we do here every child is treated the same there is no discrimination" (TN).

And another:

> "Well yes – I have heard about it [the policy] but we are not discriminatory in the school the problem is the parents" (TM).

Although both teachers referred to the school not discriminating against the children, suggesting that the policy refers to addressing discrimination, the second blamed the parents, as opposed to the school, for deficits in the education of their children.

However, some referred to teachers having a positive role to play in the 'policy':

> "The government means for teachers to help disadvantaged categories of Roma to knowledge" (TH).

And another:

> "I think it is to help – to allow Roma to integrate and participate in the same way also to help them have a goal to have a job in the future" (TO).

In both the above cases, the teachers talked about the need to help children, as opposed to either suggesting that the school had played its part by treating the children the 'same' or by blaming parents.

No teacher volunteered the part of the policy which related to training teachers in inclusive education and intercultural aspects of education by attending teacher training courses designed to help Roma pupils succeed in school. Earlier, I had spoken with a Roma inspector about the requirement for the county to provide such training; therefore, I asked teachers about this aspect of the policy. One teacher had heard about such training from her/his colleague, who attended a course. Her/his colleague, who was the only other teacher who knew about the any relevant training, told me that:

> "we were only told to include them the same as any other children… if there are children with problems just to work with them separately – ones with those problems of learning" (TF).

I later obtained a written copy of the county in-service teacher training department's (CDD) multi-ethnic course by asking two teachers otherwise unconnected with my case study to find information for me about relevant courses. Both teachers reported to me that they found great difficulty in locating any reference to a relevant course or workshop. One provided me with the syllabus of the course on Roma children's education which appeared to be theoretical without providing practical advice on teaching or inclusive education. It was also unsurprising, given the difficulty of locating the course, that only one teacher had both located and undertaken the course.

## 5.4. Uncertainty about the policy

The social worker from the local Primaria had heard of the policy, although was uncertain about its scope or its implementation. S(he) told me:

"It is only in proposals it is not proper – they did not get proper… they didn't get instructions how to…

*Do it? It is just a proposal to do it?*

Yes.

*What do you think they mean by this proposal?*

So to this offer of having access, having access in… equal access to quality education so they will do more civilised and less trouble and have the drive to be integrated into society."

*So what you mean is to make the Roma more civilised?*

(*Interpreter replied in English without repeating the question in Romanian*) – yes and to behave]

*And so to change them?*

Yes, and to be more disciplined, self-disciplined" (social worker).

The social worker displayed a discriminatory attitude towards Roma people, which was much more strongly worded that that of the mayor when discussing problems of school attendance and of one of the teachers when talking about the teaching of children who blamed Roma people for the lack of school attendance and problems within the school respectively.

Some teachers were also uncertain about the policy either because they had not heard anything formally, or were unsure what it meant, or else were sceptical about government intentions. Those who had not heard formally about the policy told me, for example:

"I have heard but don't know much of it

*What do you think it might mean?*

I consider it very welcome regardless of what it is. It depends on the teacher and the local community how much they get involved with that thing. The degree of success of this thing will depend on the teachers and others and the local community and whatever will get involved and insist on this thing" (TV).

And another:

> "I have heard from the TV and radio that they have free access – but not
> the format of the government policy
>
> *What do you think the policy might mean?*
>
> (pause) that the policy is on the line with the European standards and to
> be integrated with the EU and stuff" (TA).

The first teacher welcomed the idea and looked at the community and how it
could help. In contrast, the second teacher viewed the policy as the government's
need to conform with international influences, rather than from the point of
view of helping Roma children in the community. This demonstrated a wide
diversity of opinion about the purpose of the policy.

Several teachers were sceptical of the government's motives when asked if
they had heard about the policy, for example:

> "Yes, and I don't know what to answer it – my opinion is that this is just
> dust in the eye. This is my feeling. The statement is OK and we put in our
> charter and wash our hands of it is my opinion*" (spoken in English)* (TJ).

"Dust in the eye" in Romania is an expression which could equate to being
'too good to be true'; hence, when this teacher told me that the policy was
only statements which were 'too good to be true' I suggest, s(he) meant that
the statement was meaningless and that the government did not have the
intention of carrying out such a policy.

Another teacher told me:

> "It's just words, it's just that. I haven't heard of something real – look
> we do this and we do that – just posters – integrate them – but how?
> Even on the posters there are a lot of er – er – public persons or singers
> or I don't know what – er – they are all there and some gypsies there.
> OK it's a picture, so how to do this?
>
> *What do you think they mean?*
>
> They mean to – to make them er come to school but er –

*So the idea from the Government is...*

Yes not to go without school but – I don't know..." (TZ).

This teacher became very animated and agitated when (s)he spoke to me about this, suggesting they needed more than only posters and words. I had already observed posters in the school displaying the government's emblem as well as the EU flag prominently placed, which had as their theme: "Every child deserves to receive quality education" (see Figure 5.1 below).



**Figure 5.1.** *"Our children have the right to quality education" –*
*Illustration of posters displayed in schools, with the EU emblem*
*next to the Romanian government emblem*

A third teacher was also sceptical about the government's intentions:

> "They [the government] only talk politics and they promise, but they don't solve anything"

However, this teacher was the only teacher interviewed who later spoke of a strategy to encourage children to attend school also giving me evidence of its success:

> "I saw the children who come to school only for the milk and em…
>
> *yes 'milk and bread', I understand*
>
> all who come learn something now I saw at the end the changing
>
> *the changing...?*
>
> from the first when they only came for the milk and bread (*pause*) to see them [now] the class is almost full, nobody is missing just when something is –
>
> *So the attendance is much better*
>
> Yes" (TE).

It appeared to me s(he) was unaware that the strategy of providing a snack for all children was a stated part of the 'policy' to increase the attendance of Roma children. Although sceptical about governmental intentions and their ability to solve anything s(he) unknowingly spoke about the success of one of its objectives.

One parent told me that s(he) did not understand the policy:

> "*Have you heard about the policy? (the interpreter also explains again what the policy is about)*
>
> Yes
>
> *What do you think the government mean by it?*
>
> I do not understand what is behind these difficult words" (PE).
>
> *(Me to the interpreter – so s(he) finds it difficult to understand the words and the meaning? The interpreter replies yes).*

Another parent when I asked whether s(he) had heard about the policy, told me:

> "Yes I have heard.
>
> *What does it mean?*
>
> It means a future for children and for parents and happiness" (PL).

The first parent found it difficult to understand the policy while the second did not relate the policy to school education. Either no one had given them any information about the policy or else it had not been given in an understandable format, even though the policy specifically included both informing and involving parents in their children's school education. Alternatively, they may not have related specific issues to the policy, thus taking at least part of the policy for granted in a similar way to the teacher referred to above.

## 5.5. Not knowing about aspects of the policy

In interviews with the chief and a deputy chief school inspector, neither volunteered that any aspect related to changing teaching methods in order to provide a more inclusive environment was required by the policy. Therefore, I asked them:

> *Do you think that some help for Roma could be in using different teaching methods?*

The chief inspector replied:

> "We have a project for teaching methods but not for Roma. (*he pauses*) There is a new project with– [a local NGO]
>
> *Is this all part of 'equal access to –? (question interrupted)*
>
> They all have it – the only problem is on their side; they have to learn".

The above inspector either indicated his ignorance about policy requirements involving changing teachers' methods in order to improve education for Roma children or else he considered that this specific requirement was not relevant to his county. Furthermore (as cited in the previous section), when referring to encouraging school attendance; the inspector appeared not to blame Roma

parents or children for non-attendance, yet, in the above reference to learning, the blame was clearly laid on Roma children by her/him. Hence, I propose that s(he) implied that it was not teaching that needed to change to adapt to children's circumstances, but that children must change to fit in with the way that schools teach. *(The local NGO project referred to above was not part of the policy but was a separate initiative taking place in the school holidays.)*

In a later informal conversation with the deputy chief inspector, unrelated to the policy, s(he) asked me about the progress of my research and added that if I was able to find something that could help Roma children in school s(he) would be very interested to learn about it. This conversation demonstrated that, in contrast to the chief inspector, s(he) considered that Roma children needed help in school, as opposed to blaming children for any problems in their learning.

The second Roma inspector asked to have a written copy of the questions I wished to ask before the interview and subsequently told me that s(he) would only answer questions about her/his role. Therefore, I asked whether the Roma inspectorate had a county action plan for Roma (as required by the MER ordinance (MER, 2004). S(he) told me that s(he) had not heard of or seen such a plan and appeared to me to be very confused by the question. I showed her/him a copy of the relevant part of the ordinance and asked whether the Roma inspectorate had organised "training teachers in inclusive education to provide a suitable educational multi-ethnic environment" (one element required by the plan). (S)he told me that:

> "it is not my responsibility but yes – [Casa] Corpului Didactic run courses, lessons for knowing culture.
>
> *I repeated the questions about teaching classes which included Roma children.*
>
> Yes for multi-ethnic – last year there was a workshop in [place name] but there are many others".

According to the 1995 Education Act, 'Casa Corpului Didactic' (CDD) received its instructions given by government via the school inspectorate. Theoretically, the CDD should have been informed about developing courses required for

the 'policy' by a previous Roma inspector (who had left before I began my fieldwork) but the training should have been organised by a Roma inspector. The above Roma inspector either did not know or claimed to be unaware about this. Although I had not asked the other Roma inspector about the county plan, the second Roma inspector's responses indicated an absence of communication of this 'policy' requirement within the inspectorate or, alternatively that previous Roma inspectors had not followed the government's instructions to produce a county action plan.

The councillor and education commissioner from the Primaria, when asked whether s(he) had heard about the policy replied:

> "No, not at all
>
> *What do you think the government might mean by it?*
>
> A better social integration
>
> *A better social integration between Roma and non-Roma?*
>
> Yes, yes, yes
>
> *In the schools, or in general?*
>
> In general
>
> *Do you think this is happening in –?*
>
> Not yet.
>
> *Are there things the education commission could do to help it?*
>
> We have not discussed this issue in the council or even in the commission".

S(he) then gave me a copy of the council agenda that I could scan and return to him in order, I assumed, that I could understand what was discussed in council meetings.

The unofficial Roma representative also told me that s(he) had not heard about the policy:

> "I do not know about any policy from the government to help Roma but we need much help".

I was aware that the unofficial Roma representative lived in one of the Roma communities in the local district, had younger relatives that had attended the local schools during policy implementation. S(he) told me that:

> "help for children is very important. Many [Roma children] have difficulties with education. Children are discriminated against by teachers who do not help them with difficulties – parents cannot help with the [school] work. I believe that most parents never attended school and others abandoned after the first one or two classes. *(pause)* In my class I was the only one who graduated from high school and there were ten Roma children in the first class (*first year of school*)".

Not only had s(he) not heard about the policy from the Primaria but also s(he) knew nothing about the policy as a member of the Roma community. It was unsurprising that s(he) had not heard about it officially from the Primaria, given that the education commissioner cited above knew nothing about it. However, both as part of the Roma community and someone who told me that help for children was very important, the Roma representative had not even heard anything about a policy from parents in the Roma community, even though the policy required their involvement. This indicated to me that little, if anything, had been done to inform parents about a policy which specifically related to both them and their children. The comments above also contradicted those made by some teachers (cited in 5.3), that teachers did not discriminate against Roma children.

Several teachers told me they were unaware that there was a specific policy:

> "I have not heard about it" (TP).

And another:

> "I was aware that even in my high school and college there were groups of Roma children on the special place scheme but I wasn't aware of a specific government strategy" (TS).

And another:

> "I am not sure if I have heard about it as a policy but we are not allowed to have any discrimination" (TF).

And another:

> "I have heard from the TV and radio that they have free access but not telling about the quality.
>
> *So you have heard of access, equal access for Roma children but not the idea of quality education?*
>
> Not the format of the government policy" (TA).

This illustrated that 'policy' requirements had not been clarified either in school teachers' meetings or by written notifications, at least for the above teachers.

Another teacher illustrated her/his lack of knowledge on one particular aspect of the policy:

> "I think that there should be a tax on those parents who won't send their children to school. In plus those who have a number of absences lose the money they are paid in social [child] payments... Maybe in separate schools for Roma because in mixed schools they it does not exist but maybe in their separate schools there exists this policy.
>
> *Do you know that there is now a law which forbids schools only for Roma children unless they are taught in their own language?*
>
> No there is a policy which calls for if there are large groups of Roma they have a school of their own" (TG).

The above teacher appeared to be ignorant of the part of the policy, also covered by legislation, which banned segregated schools unless a school or class was taught in Roma language, with rare exceptions made only if a community was too remote from an existing school.

When prompted by me, apart from the two teachers referred to in 5.3, all other teachers told me that they had not heard of the existence of a course for training teachers in inclusive education or for a multi-ethnic environment:

> "no there has never been one" (TC).

And another:

> "I think it would be a good idea if they existed" (TV).

And another:

> "no – I entered on the site and I never saw something like this"
>
> *So you looked on the internet?*
>
> yes
>
> *On the local – [county name]?*
>
> Yes, yes, there are of course, [there are] some courses – and... but I've never seen it" (TZ).

This illustrated the lack of readily available information about relevant courses provided for the teachers and that the 'policy' objective of training teachers in inclusive education (see Appendix 2) had not been successfully implemented within the case study schools.

Roma parents demonstrated a lack of knowledge about provisions that would have been there if the 'policy' had been fully implemented. For example:

> "I would like my children to learn to read and write" (PJ).

And another:

> "Here in the school to be more help because this is the problem with helping inside the school" (PE).

One parent added:

> "the big thing is not discriminatory – this is a problem we have".

At the end of the interview, s(he) added that

> "we [Roma] are not expected to have our opinions asked – the situation is there and we have to deal with it" (PA).

The first two parents appeared to be unaware of the measure that provided for extra help for Roma children at the parents' request. The third parent not only highlighted that discrimination still existed, despite preventing discrimination being a major objective of the policy, but also illustrated that there was no expectation for Roma people to be involved in school situations, contrary to

the policy requirement to involve parents in decision making. I found no evidence from Roma families interviewed, nor from the unofficial Roma representative to the Primaria, that the Roma community was aware of how the 'policy' related to them or their children, although some measures, such as the integration of classes may have been taken for granted.

## 5.6. Additional measures needed in the policy

Personal views given to me about what else was needed in the policy included social education, being provided with more resources and, by one participant, educating parents. For example:

> "Something to start with, something which is very common sense and basic, like behaviour, clothing, social aspects, the basic standards of conversation and communication and behaviour… What should be accepted as a necessity is how to keep clean, how to have clean clothes, have good behaviour and conversation… and then to have an assessment – what they want to do in life, how it is possible to reach that goal within the existing system and opportunities… and in the end, even amongst them there are those being very willing to learn and to progress. Yes, there are among them those who are interested in just getting married, just to be poor to be like a minimum quality, not to have a job, to make money for their everyday lives. Then for the others the mayor's office to monitor them, to assist them and then maybe a scholarship or something… they are our people, they are part of the community… It is a shame because they are good children and they are lost" (TI).

I contend that this teacher held a deficit perception of many Roma children, and also considered that it was the children that needed to change to fit into the educational system.

And another:

> "activities only for them and help them to understand er what is good, what is wrong, what can you do at school, what can't you do at school… even to try to teach them how to wash themselves, even this, to er dress themselves" (TZ).

And another:

> "If something must be done it has to start with the children so children can become open minded and that is why there is a problem. At school it is not so much academic work but social skills etc." (TP).

The suggestions above, for additional measures needed to work towards a policy of equal access to quality education for Roma, put the onus specifically on Roma children to change their ways rather than for a school to adapt to the circumstances of individuals regardless of ethnicity. Thus, these teachers held a deficit perception of Roma children. However, the first teacher quoted in this sub-section suggested that only the children who were willing to learn and progress should receive more help, thus did not stereotype all Roma children in the same way. I consider that not only did all the above teachers show a lack of empathy for the situation of Roma people or understanding of their culture but their opinions were far removed from my personal perception of what a policy to provide equal access to quality education for Roma should include, which was that the school should adapt to the children, rather than the other way around.

Another teacher considered that providing more funding for Roma families should be included within a policy in order to provide equal access to quality education:

> "Mainly with... I don't know... with social support to help them to work give them something get them to come because all is about the money, everything... and if they don't have money the children when ten years old can go to work, of course the father, he will take the boy and he will go with him" (TJ) *spoken in English.*

The need for more financial resources in order to help their children attend school was also given by parents, for example:

> "It's just money for all the things the children need to go to school" (PC).

And another:

> "Money, with money to buy for the children what they need to go to school, when the people are poor and have not the resources" (PB).

The participants above raised the concern that poverty was preventing children from attending school.

One teacher told me that:

> "It is the parents that need educating. If they were educated there would not be a problem" (TN).

This perception blamed the parents for any lack in their children's education rather than the school not adapting to the circumstances of children whose parents had not been educated (from the families who participated, I discovered that almost half of them had never attended school).

Only one teacher referred to school problems being caused by existing methods:

> "There are a lot of things which are in the way and they tend to not be at the school.
>
> *So there are lots of reasons for Roma children not to be at school?*
>
> *(S(he) nods in the affirmative)*
>
> So the standard at the school especially how the school organises – is organised, the methods are not good for them (*pause*)
>
> They *(pause)* are not attending the kindergarten and from the start it is clear that they are not prepared for getting straight into their education.
>
> *So because they don't get to kindergarten they are not prepared, so s(he) feels that in order for them to have equal access to quality education, they need to go to the kindergarten?*
>
> It could be very important because they have not the basic knowledge like up down, left right – and in one year they could learn these things" (TA).

This teacher did not blame the Roma children, telling me that the school methods were not good for Roma, without suggesting they should be changed. Instead, s(he) suggested that it was important for them to attend kindergarten.

# Conclusions

The research sub-question referred to the 'stated' perceptions of policy; however, in some cases, aspects either may have been taken for granted by participants, or else were not recognised as being part of the specific 'policy'. For example, this may have been the case with the directive and later legislation which banned segregated schools, referring to them as discriminatory. Although it appeared to be widely known and understood by administrators and teachers, it was not mentioned by parents. However, parents may have had no experience of segregated schools and, because all classes had been integrated in the area since 2002, had not recognised it as part of the policy.

Other than the above policy issue, during the interviews there seemed to me to be little knowledge of policy details, both within and between the different areas of responsibility. In some cases, responsibilities for policy implementation had been divided between different bodies, such as the school-inspectorate, the CCD and Primaria. This division of responsibilities could, for example, account for the local mayor being aware that the schools for which he had responsibility must be integrated, but not of any other aspects of the 'policy', except possibly concerns about improving attendance. I consider this could be the reason why the others interviewed from the Primaria knew little or nothing about the policy, taking integration for granted but not having been informed about other issues. As well as the fragmented nature of responsibilities, frequent changes of personnel in the inspectorate may have also contributed to the apparent lack of knowledge about policy details and therefore their responsibility to ensure that all aspects of the policy were known, understood and had been implemented in the schools.

The only participant in my study who appeared to have a good knowledge and understanding of the 'policy', at least in principle, was the schools' director, who had held such a role since before policy inception. In this role, s(he) had access to the internet, where policy details were available, and had been in contact with the successive officers of the schools' inspectorate

throughout the ten-year strategy. However, there was an apparent lack of an agreed vision within the schools, or a clear strategy that was known and understood by the local mayor and education commission, teachers or parents. This suggested to me that there was either a lack of information, leadership or lack of interest in 'policy' implementation. Another possible contributory reason for a lack of knowledge could be that the schools had received no funding for relevant projects from non-governmental sources, which may have provided them with more information.

The chief school inspector, the mayor, the social worker and several teachers blamed Roma for the problems encountered in education that should have been addressed by the policy. These participants suggested that Roma needed to change in order to fit into the system, rather than the system changing to help meet the needs of Roma children.

Some key aspects of the policy were not referred to by any participant, such as involving Roma parents in decision making, or including minorities' cultures and traditions within the curriculum.

# CHAPTER 6. Practices relating to school education

This chapter addresses the second sub-research question:

> *What are the current practices in the case study area that affect the realisation of the 'policy', regarding the education of Roma children?*

The main objectives of the 'policy' are provided in Appendix 2. As in the previous chapter, I use gender neutral words when referring to participants, identifying them either by their role or in the case of teachers, with a letter prefixed with "T", in the case of parents prefixed with "P" and in the case of former pupils with the prefix "FP" followed by a number. I use italics to denote questions asked, or comments made by me during interviews.

The first section explores classroom activities, investigating how schools responded to "the circumstances and needs of all learners" (UNESCO, 2000, p.16), which theoretically was part of the 'policy' goal (see Appendix 2). Therefore, I start by considering issues affecting the engagement of Roma children in the classroom. This is followed by a consideration of classroom activities, including constraints placed on the schools in order to conform to national regulations which may have a disproportionate effect on Roma education hence 'policy' implementation. I then investigate the day to day classroom situation in both the primary and junior-secondary school departments. The next section investigates connections between school and home, after which I analyse the factors that were considered to be more important than attending school.

## 6.1. Engagement in 'classroom' activities

## 6.1.1. Issues affecting the engagement of Roma children in the classroom

### 6.1.1.1. Not attending kindergarten

The 'policy' made no reference to encouraging attendance at kindergarten; however, this was raised by teachers as a factor which hindered the progress

of Roma children. I had previously discovered from kindergarten teachers and my prior experiences of visiting kindergartens that the children followed a specific curriculum, including knowing and writing capital letters and numbers from 1–10 as well as appropriate behaviour for formal class lessons. I had been told by kindergarten teachers that all non-Roma children attended kindergarten.

A primary school teacher told me:

> "One of the troubles is that many of the Roma children are not enrolled in the kindergarten. It does have its role and its purpose in life" (TI).

And another:

> "In the first semester it was very hard for me, because you know none of them [Roma] had kindergarten" (TE).

Similarly, another:

> "The Roma children don't make the same progress…because they don't go to kindergarten" (TF).

The above views, expressed all but one primary school teacher, indicated not just that the lack of pre-school education was a problem for children, but TE, for example, considered it difficult for teachers to accommodate differences in children's preparation for school.

One teacher blamed the lack of kindergarten experience on parental attitudes:

> "In the last years they [Roma] haven't attended the kindergarten, but now they [parents] have changed the way they think and [their children] start to go to the kindergarten" (TT).

No Roma parent interviewed indicated a lack of interest in sending children to kindergarten, although several told me that it had not been possible, for example:

> "I did not have the clothes and food to feed them and send them.
>
> My husband cannot work, we are without *(social)* support and I am the only earning person

*So that is why they did not go to kindergarten?*

Yes. I would have liked them to go" (PL).

Another parent arrived at school to see me with a young child, so I asked:

"*Has s(he) started school?*

Not yet

*Does s(he) go to kindergarten?*

I have just collected her/him from kindergarten

*Did* [name] *go to kindergarten?*

No, s(he) has not been any time.

*Is there any reason why s(he) did not go?*

We did not have a permanent place. We used to live in different places, with the grandmother in one village and the father in another…it was difficult to register in one permanent place" (PE).

Poverty and home circumstances were given as reasons for not attending kindergarten by the two Roma families cited above. In view of my obvious interest in education (by conducting the research), I consider it unlikely that any Roma parent would tell me that they were not interested in kindergarten; equally, there was no evidence given to suggest that Roma had "changed their attitude" as cited by one teacher above.

When I asked the social worker *Do you know why Roma parents do not send their children to the kindergarten?*

S(he) replied:

"Almost the same. [*as the reason why children abandon school – lack of clothes, lack of shoes and the general poverty*]. It is also the taking little kid to the kindergarten and the Roma parents, the Roma are a bit lazy and so they take an easier life… The children can't go to school by themselves, it is a long way. Also, they need to be in proper clean clothes every day and every time because if they are smelly the rest of the children will not play with them, they are isolated".

Although the social worker made a discriminatory and stereotypical remark about Roma being lazy, s(he) acknowledged that it was a long distance to the school and that there were other reasons, including that the children could be marginalised by non-Roma children. From my own observation I knew that it could take me more than half an hour to walk to school and that many Roma parents had several children under school age who would all need to be dressed suitably for weather conditions and taken to school with their parent, some possibly being carried. I considered that arriving at kindergarten by 0800, especially when it was dark, would be a difficult task for parents.

### *6.1.1.2. Frequency of absences*

Encouraging attendance at school was a policy objective (Appendix 3). However, teachers mentioned that the frequency of absences amongst Roma children was a common practice, which they linked to their comparative lack of progress in class lessons. For example, one teacher said:

> "I notice a difference [in progress] – Roma children have more absences than the rest. Most of them are intelligent" (TG).

TG did not blame a lack of progress on the intelligence of Roma children.

Another teacher told me:

> "Teachers lose motivation to teach if a child says 'I don't know how to read'. This is only the Roma. Romanians attend the school and keep continuity (*in English)*" (TB).

TB suggested that by not attending school, Roma children lost the continuity and so were less able to become literate.

And from another teacher:

> "We have problems, it is a pity because many times [name] is missing from school.
>
> *What about the other [Roma children]?*

> Now they come and it is very difficult as they missed a lot and I must start again with them. You can't follow the curriculum – you can't build a house from the roof" (TP).

The teachers above told me that frequent absences were a reason for children's lack of progress. TG appeared to accept the situation, TB gave a teacher-centric view, referring only to how children being absent affected the teacher. Only the TP appeared to consider that s(he) needed to be proactive by taking into account the circumstances of these children.

Another teacher explained to me that if teachers followed the official regulations and recorded all unauthorised absences (those which did not have a written note from a parent or doctor), the number of absences by Roma children would lead to them repeating the year and ultimately, being excluded from school:

> "If there are 10 unauthorised absences [from single lessons] that is one mark that goes down on the behaviour [grade] but [if they did this] there would be no Roma in the class because they have more than 100 absences.
>
> *So there are problems?*
>
> Big problems for us to do the official – so we close our eyes" (TC).

This teacher referred to many absences of Roma children without directly relating it to a lack of progress; however, it lent weight to others who suggested that absences were a reason for Roma children making less progress.

As well as interviews, I analysed absences recorded over one academic year, in order to help illuminate the extent of differences of absences between Roma and non-Roma children. Statistical data collected was not to check the veracity of teachers' perceptions above and, being quantitative, held a different ontological assumption. Attendance figures were available only from one village school. The results are illustrated below, in Figure 6.1:
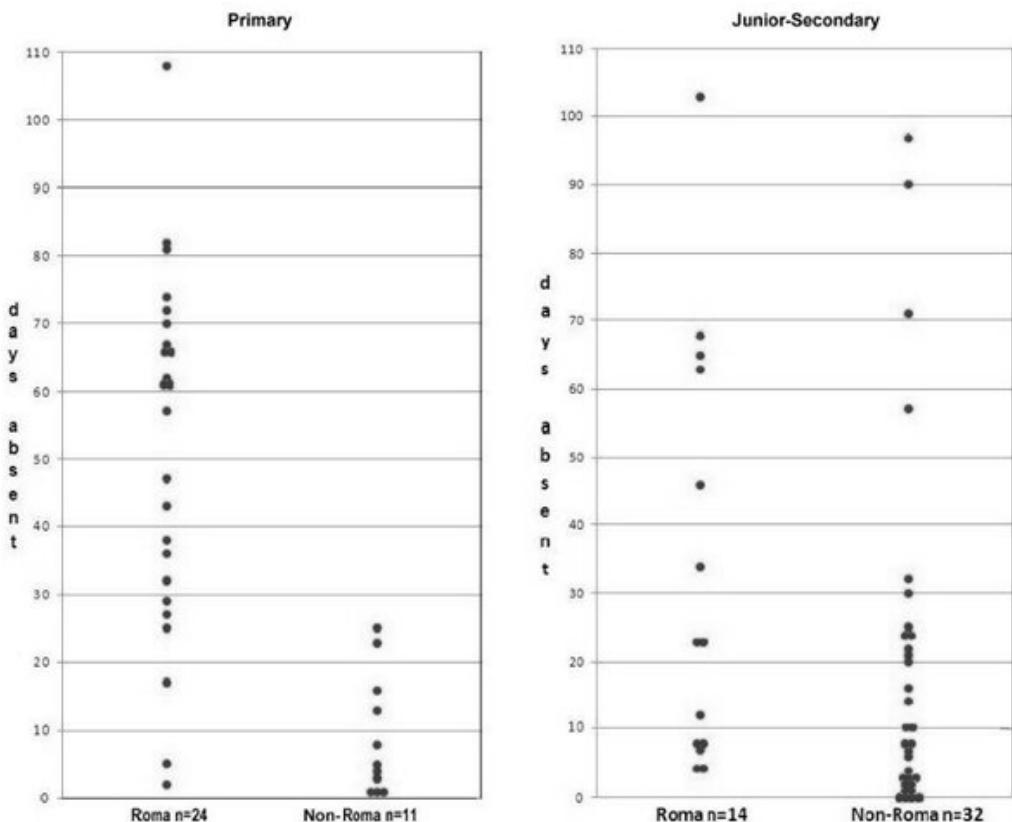
**Figure 6.1.** *Scattergrams to show the number*
*of days absent over a one year period for each child in scool A*

Please note that the scattergrams refer to days absent as opposed to number of unauthorised lessons missed.

In the primary school five pupils were discounted because either they were in another country and had only attended school on 4 days, or else they had dropped out at the start of the year. In the junior-secondary school, two children had not attended at all during the year, hence were also discounted from the data.

Differences in frequency of days absent between Roma and non-Roma children in both departments were statistically significant using the Mann-Whitney U test. (see Appendix 4 for details). The scattergrams above also illustrate a

greater dispersion of days absent over the year for Roma children compared with non-Roma children, and that some Roma children attended very regularly. Therefore, the variation in number of absences per pupil throughout the year in the primary school appeared to be a particular issue for Roma children for the year recorded, but in the junior-secondary department, absences were an issue for some children but were only confined to Roma pupils.

### 6.1.1.3. Help at home for school work

Several teachers considered that not doing work at home, including homework, specifically affected the progress of Roma in lessons, for example:

> "They [Roma] have not time at home to – their lessons, that means, supplementary work.
>
> *Their homework?*
>
> Yes
>
> Also there is nobody available in the family to help" (TH).

And another teacher:

> "The greatest part of the [Roma] parents are illiterate – they [Roma children] don't have at help at all, they remain only with what they heard of in class in school" (TE).

And also:

> "The Roma children don't make the same progress
>
> *Why is that do you think?*
>
> At home nobody helps" (TF).

There was agreement above that not having help available at home affected school progress, with two teachers recognising that home circumstances made such help unrealistic. This suggested that at least some teachers relied on help from home in order for children to make adequate progress at school, hence did not adapt their lessons in order to meet the circumstances that such help may have been difficult or impossible.

Several parents confirmed that they had difficulty with providing help at home for schoolwork:

> "*When they bring work home, is it difficult for them?*
>
> [name] has difficulties.
>
> *Was anyone able to help?*
>
> No because there is no one around here capable to help" (PC).

And another:

> "Do they find the homework difficult?
>
> If it is too difficult they ask for help from their friends at school because at home they cannot get any help" (PH).

Also, this parent:

> "With [name] the work is too complicated for me so s(he) has to sort it out (PA).
>
> *(The child was present so I asked her/him) Do you ask teachers for help?*
>
> Sometimes when I have the courage"

These parents' responses added weight to the teachers' assumptions that there was not always help available at home.

When a group of seven Roma junior-secondary pupils were asked whether they did their homework, two children told that that they didn't because:

> "I am too tired".

I then asked a non-specific question:

> "*Why do you think some children don't do their homework?*
>
> They do not know how to *(volunteered by one child with general agreement of the group)*"

Although children did not refer to the lack of available parental help it also illustrated the need for teachers to take into consideration that the homework they gave may be too difficult for children to attempt.

### *6.1.1.4. Educational neglect*

Parents and former pupils referred to disadvantages experienced in class through children's differential treatment. One parent told me that:

> "They are at a disadvantage – the Roma children – they are not so involved in the learning process so much so they don't get homework as such.
>
> *Not even the child in Class 6?*
>
> No – they are going to the school just to be seen that they are going to the school
>
> *Is that what you think the children think, or is that what you think the teachers think?*
>
> The teachers. Even if we are sending them to school, they are not involved, they are not part of the school, they are not getting, inside the classes a lot to do.
>
> *So they are not getting help in classes?*
>
> Yes that is correct.
>
> Sometimes when I am not going to the school [with them], I am sending them to the school and the children are going half way only and saying that their teacher has sent them back home, which is not true.
>
> *Is that because they don't like learning?*
>
> There is a reason, one that they are bored and also that it is difficult to get the right clothes and shoes for them
>
> *So they don't like going to school is it because they don't have the same clothes as the other children*
>
> They feel offended (the children)
>
> *Is that all the children?*
>
> Yes" (PB).

This parent blamed teachers for discriminating against Roma children by having less interest in them and giving them less work and gave this as part of the reason why they did not want to attend school.

Other parents expressed similar views about teachers' attitudes:

> "*Do you think that they [the children] are making good progress in school? (she does not appear to understand)*
> *Are you happy with what they are doing?*
>
> No, I am not
>
> *Can you tell me some of the reasons why you are not happy?*
>
> Unfortunately they don't learn… The teachers are not bothered with the Roma, only the Romanians" (PD).

Another parent responded to the question:

> "*Are you happy with what the school teaches?*
>
> I don't know, but I do know that my children do not know what the others know – they are badly regarded, ignored.
>
> *Why do you think this? (s(he) appeared to consider this question for a short time before answering.)*
>
> It is because we are poor – this is what I think" (PL).

All three parents told me that their children were being discriminated against at school and hence, not receiving the quality of education given to others although PL considered it was because the family were poor, rather than because of their being Roma.

Former pupils of the school spoke about being discriminated against by teachers because they were Roma:

> "*Did you like school?*
>
> Yes *(pause)* but Roma children were treated differently.
>
> *In what way?*
>
> We were not given help. If we asked for help we were told that because we were Roma we wouldn't understand (FP3).

And also:

> "*Did you think Roma children were treated differently from Romanian children?*

Yes

*In what way?*

They [teachers] were nicer to the Romanians.

*In what way?*

They helped the Romanians more than the Roma

*Why? – she just shrugged her shoulders but did not offer an answer.*" (FP1)

These two former pupils told me they were given less help because they were Roma. This reflected the opinions quoted above by two parents.

And another:

"*When you were at [school name] did you enjoy being there?*

(*She smiled very broadly*) Yes in general – brilliant – very much – we all passed – teachers gave us a high grade so they would get rid of us.

*Who do you mean by "us"?*

Roma. The teachers were very nice but the class teacher was very racist" (FP5).

This former pupil, although enjoying being at school, told me that Roma were being discriminated against because she thought teachers wanted to get rid of them, even though she felt that the teachers were "nice". She also believed that one teacher was racist, showing that she felt that Roma were discriminated against purely on their ethnicity.

However, a contrary opinion was also expressed by one:

"*Do you think that Roma children were treated differently?*

The teachers treated us all the same" (FP4)

FP4, in contrast to the other former pupils, had lived within the village rather than a Roma community, which might have been the reason for a difference in perception of school.

One teacher partly blamed the school for Roma children being absent from school:

> "The absences [of Roma children] have increased over the last few years
>
> I think the part of the guilt is on the teachers because they don't value them very much or pay much attention to them.
>
> So teachers in general?
>
> Yes teachers in general *(said by interviewer but understood by teacher who understands English and nods her/his head)*
>
> Yes I think. They are not racist, they don't have any prejudices against them but it comes from the… that OK they are gypsies and so not to take so much care for them or to get too much involved with them" (TC)

What was notable was that, as well as suggesting that teachers were partly to blame for children not attending school, TC did not relate taking less care or having less involvement with Roma as being either racist or prejudiced. This displayed a contrary perception of discrimination to my own definition, given in Chapter 1.

### 6.1.1.5. Stereotypical attitudes affecting classroom practices

Removing stereotypical attitudes towards Roma was a major 'policy' objective; also, a policy requirement made in 2007 was for schools to develop codes of conduct and implement disciplinary action for acts of discrimination.

The schools' director told me that:

> "There are, in my opinion two categories of Roma, those who want to learn and those who don't – those who want to learn, they are not 'super duper' but are sufficient to progress each year. ('*super duper' was spoken in English*)
>
> *And those who don't want to learn?*
>
> Those who don't want to learn, first they are undisciplined also violent, hyperactive and often absent. When they come they disturb the classes".

Roma children were stereotyped, not only by considering they could only make sufficient progress to graduate to the next class non-Roma children, but also that not wanting to learn was an alternative facet of Roma character. What also appeared to be of importance was how s(he) considered that some Roma children adversely affected both the teacher and other children. Such discriminatory views were at variance with the views s(he) had expressed about the 'policy' (see previous chapter). Therefore, as the school director, I contend that such personal views would have had a greater impact on school policy than her/his spoken perception of the government's policy; in particular developing codes of conduct as related and disciplinary measures for acts of discrimination as referred to above.

Some teachers also made unfavourable comments about Roma children's ability:

> I teach from 5th to 8th [class] and em unfortunately they don't attend the school up to 8th class. There are Roma, one of them is quite clever... what does clever mean… X knows to write from his own mind not just copying… OK not correct, but he knows er and Y doesn't know, s(he) knows just to copy (TZ).

I was also invited to observe a class that had three Roma children on the roll. The teacher (TT) wished to show me that their work, telling me that although the children were Roma their work was almost as good as the non-Roma children (field notes June 2010). Both teachers made the assumption that Roma children were not as able as non-Roma children, thus stereotyping in terms of ethnicity. I suggest that having lower expectations by putting a ceiling on attainment for Roma children could lead to children being given less demanding work and thus being prevented from realising their potential in terms of school attainment.

The above expectations, based on stereotypical viewpoints, were not shared by all teachers. When discussing children's interest in lessons raised by one teacher I asked:

> "*Do you feel, therefore, with all children whether Roma or Romanian, if you get their interest they will learn and progress?*
>
> Yes, yes if you get their interest they learn regardless of whether they are Roma or others" (TI).

This teacher did not feel that progress was solely related to ethnicity. The issue of comparative ability was not raised by other teachers; hence I am unable to draw conclusions about whether stereotypical views that related ability to ethnicity were widespread within the teaching community. However, evidence existed that the school director, who held the most influential position in the schools, discriminated the ability of Roma in this derogatory way.

## 6.1.2. Classroom activities

The analysis of data highlighted that classroom activities were impacted by constraints placed on schools, which ran counter to enabling equal access to quality education for Roma children as well as measures taken to respond to Roma children's identified circumstances and needs. In addition, lessons were observed in order to test hypotheses derived from a reading of the literature that Roma children sat at the back of the class and were ignored (Horvath and Toma, 2006; Fleck and Rughinis, 2008). I tested the hypothesis that they were ignored using quantitative analysis against the null hypothesis that 'there is no difference in the number of interactions between the teacher and Roma children compared with the teacher and non-Roma pupils during lessons". I made plans of classroom seating arrangements in order to test the hypothesis that Roma children sat at the back of the classroom (see Appendix 3). Qualitative and quantitative observations were made simultaneously because numbers of teacher interactions could not, on their own, give a full picture of pupil-teacher contact.

### 6.1.2.1. Conforming to national regulations

The importance of compliance with the national curriculum was stressed to me by the schools' director. After each lesson, teachers must record what

they had taught in a central record book for each school class. The record books were checked regularly by the county inspectorate against the school plan, which must closely follow state-produced textbooks. This was to ensure that each teacher adhered to curriculum requirements. I observed that teachers came into the staffroom in the break between each lesson and usually wrote down the topic of the lesson they had just taught in the class record book. I also observed school inspectors visiting the schools on two occasions to check that the curriculum was being taught at the prescribed time. From prior knowledge, through informal conversations with the schools' secretary and a school inspector, I was aware that at the end of each school year, the school submitted overall school results as well as the attendance records to the schools' inspectorate.

In both an interview with one teacher and in informal conversations, teachers suggested that adherence to the curriculum was the most important facet of their job. For example, in an informal conversation with TA, (s)he told me of her/his worry because (s)he had to start teaching 'division' on that day (because of the curriculum requirements) but the children did not yet understand 'multiplication'. Prior to the start of one lesson TC pointed out to me what s(he) had to teach for that lesson, because that was the order it must be taught, according the textbook. TI told me, following a lesson that I had observed, that s(he) had to teach something in the lesson that as an expert in the subject, s(he) knew was incorrect, but it was in the curriculum, so it must be taught.

During an interview I was told that:

> "we have our work to get through, we must get through and we can't wait for them [children] to catch up" (TB) *(said in English)*.

The priority of adherence to a strict timetable and method for teaching curriculum topics, together with the importance attached to it by teachers and the inspectorate, ran counter to responding to the needs and circumstances of all children, regardless of whether or not they were Roma.

Within the 'policy', plans were made to make obligatory "elements of minorities' history, culture and tradition in… history geography and culture textbooks" (MER, 2003). In order to establish whether this was now part of the curriculum, I asked the relevant teachers if their subject included references to the different ethnic groups in the school. One replied:

> "History is combined but Roma history is only spoken and so not in history books. It is about events which happen, battles and so on. There is written about the relationships with the Hungarians in history… it is about causes and the social… (TG)

> *and those don't include Roma events*?"
> *(The teacher shakes her/his head in the negative).*

Another said:

> "The subjects are very general, if you really want to learn [about this] the chances are in High School, vocational school or university.

> *Is this because of the national curriculum?*

> Yes. The textbook is the same and I still have to follow it" (TI).

TA later told me that no reference was made to Roma history or culture in primary school textbooks and that history and geography only related to kings and countries adding that, because of time constraints, they even needed to be selective in what they taught on these topics. The above remarks illustrated that the curriculum had not been modified according to 'policy' plans, at least for classes up to the end of junior-secondary school; therefore, curriculum regulations prevented teachers from carrying out this aspect of the 'policy'.

All children were assessed by their teachers when they started either primary or junior-secondary school and at end of each academic year, and had to achieve a satisfactory grade (5/10) in all subjects including 'behaviour' in order to graduate to the next class. A teacher (TB) explained to me in an informal meeting that in order for absences to be authorised (hence no marks deducted for behaviour), the school must receive a prior request approved by the schools' director, an approved written explanation, or a doctor's certificate. The law

also stated that a child must not be more than two years older than the normal age for her/his class. Therefore, if someone needed to repeat a year more than twice (s)he must leave school. This information was also verified by the schools' director. Thus, either lack of sufficient progress to graduate or else too many unauthorised absences could eventually lead to a child being permanently excluded from the school system before the end of compulsory education. The school rules for being granted authorised absences meant that parents had to either be literate, or find someone literate to write a note on their behalf, or else obtain a doctor's certificate. They also needed to be aware of this rule.

Teachers' evidence, above, referred to parents being illiterate and I observed that all the parents I interviewed needed the written information about my research and consent forms read to them by the interpreter. I also observed that several parents signed the consent form with an "X" because they could not write their name. These circumstances, I consider, would have made conforming with the rule to provide a note in order for absences to be authorised difficult or impossible for some Roma parents. The alternative of a doctor's certificate may not have been affordable by every parent, as evidenced below:

> *When [name] is ill do you get a note from the doctor to take to school?*
>
> No, because we need to pay for the ticket and before it was 5 lei and now it is 15 lei and I don't have the money" (PG). *(15 lei at the time was equivalent to almost 40% of the child allowance)*

I asked the schools' director whether the rule of exclusion because children could not repeat more than two years had been applied. S(he) answered:

> "Yes, a boy who repeated class 7 and they also found out he had repeated earlier and so could not repeat again and was not good enough go into Class 8. The biggest problem was in missing classes – there was no chance [for him] to recover learning".

In this situation the law that forbade repeating a grade more than twice was respected, but the law making it compulsory for children to have ten years at school was contravened (MER, 1995).

Primary school teachers told me:

> "They [some Roma children] have also repeated twice some of the classes, they cannot repeat – the Romanian regulations state that they cannot repeat more than this – they are forever out of the system. The alternative is to be put in the street without any chance.
>
> *Has this happened many times here?*
>
> There were a few cases but recently we try to push them in the system, to keep them in the system – for them to repeat a year is not a solution" (TD).

And also:

> "*In your experience do all children reach the basic requirements needed to progress to next class?*
>
> Some of them pass the class because she wanted to help them in order that they won't be in a class with another teacher and the help they would get would not be so good. The children get accustomed to a teacher" (TF).

The first teacher considered it was in the interest of the children to remain in school rather than to conform to the regulation whereby satisfactory grades were necessary in order not to repeat a year. The second also ignored the regulation to act in the best interests of children, in this case so they could keep the continuity of being with the same teacher. On the other hand, another teacher told me that:

> "The problem is that [a Roma child] is in the third class with the mind of a kindergarten child, but next year will be too old so must go to Class 4. Money is the real problem – not to lose the money they [must] graduate but many others work hard to graduate and there is a frustration with the other children. This makes them unfriendly because they see there is a difference – they think it unfair.
>
> *What would happen if you said s(he) did not pass – if you are honest with the grades?*
>
> It can't be done – If I don't help to pass the class – maybe s(he) would be taken to a special school.
>
> W*ould it be better to attend a special school?*

For her/his personal evolution it would be better to do that, but parents need the money" (TP).

This teacher was more concerned with the family's loss of income rather than what was in the child's best interests educationally, even though as a consequence of graduating, other children were unfriendly towards her/him. In this circumstance, the teacher was not working to meet the child's needs but, rather, the economic circumstances of the whole family.

A junior-secondary teacher told me how s(he) helped to ensure that every child graduated each year in her/his subject:

> "*In your subject, each year does everybody manage to reach the basic standard able to go onto the next year?*
>
> I have on the one side children with talent and on the other side children who can't learn so I give at least a five to everybody" (TC). (*five is the grade needed to graduate*)

I also observed in class records (February 2011) that one child who had not attended school throughout the semester, hence had not taken school tests, had been given 'fives' for attainment in several different subjects, indicating to me that, at least during that semester, s(he) was not the only teacher who gave this grade as a minimum for all children. This also accorded with FP5 quoted above who referred to teachers giving Roma high grades.

Whatever the reason for children graduating without having reached a 'pass grade', I contend that they would be even less likely than others to cope with the demands of the curriculum of the higher class, hence could fall even further behind in attainment than their peers.

This sub-section demonstrated that teachers considered that they needed to ignore one regulation either to conform with a contrary one, in order to act in ways that they considered to be in the best interest of children, or else, in one case, to meet what they considered were the economic needs of a family. Laws that were contradictory meant that teachers needed to choose which law to conform to and which to ignore. This need, I consider, could also have

had an impact on how some teachers had or had not implemented the 'policy', as they were already accustomed to ignoring some regulations.

### 6.1.2.2. Teaching children in separate groups

Children were taught by the same class teacher throughout the primary years, unless a child repeated a year. The exception was for religion, sport and English, which were taught by subject specialists. In two of the three primary departments, teachers taught two different year groups together, either years 1 and 3 or alternatively, years 2 and 4. I observed lessons over two semesters in each of these four groups and also a single year group from the other primary department (the other year groups had less than four Roma children enrolled in their classes during my field-work).

In every class observed there was one group that followed the prescribed curriculum for the year and was provided with textbooks, and at least one other group that neither followed the given curriculum nor usually had a textbook.

There was a total of sixty-seven children, of which twenty-nine were Roma, in the five classes observed. Eight lived in a main village, with six of these included in a 'curriculum group' when I began observations. A seventh later moved to sit with a curriculum group at the request of her/his parent. In the groups not following the curriculum, only two non-Roma children were included with the twenty-two or twenty-three Roma children, hence Roma children were disproportionally in non-curriculum groups. When discounting those who lived in main villages, the proportion of Roma living in Roma communities to other children was even greater. This suggested that the need to teach the curriculum only to those the teacher considered able to cope constituted indirect discrimination.

One teacher explained why there were different groups in their classes:

> "It is very difficult to teach simultaneous, so it is very difficult, it is hard work because by start I've got 2 groups, being 2 classes, they're in age

groups, then further groups depending on how they are better or worse in studies – I can work only with different work. So in the first class, not the Roma, I have those who can read and write and just count very well to 100 and there is another group who only now learn about the numbers and the third one is counting the numbers up to ten.

*So you have 4 groups effectively?*

and so in the 3rd class again 2 levels" (TE).

This teacher confirmed that in one class the only children who could read and write were non-Roma. This emphasised the difficulties faced when teaching a highly prescribed curriculum to all children in the year group, as well as differences between Roma and non-Roma children's attainment.

During lessons observed teachers displayed an easy, warm relationship with all the children both Roma and non-Roma. I consider that this was not something that could be put on for my benefit because it appeared to me to be a long-term relationship that had been built up. For example, when a teacher went out of class and left the door open with the children all working, on her/his return, one Roma was caught peeping round the door. Smiling, the teacher shook her/his fist in a playful way and the child smiled back then went back to her/his work. In all primary departments observed, children who did not follow the curriculum tended to be grouped together in the classroom and in one department, those following the curriculum usually sat at the front, with the 'non-curriculum' group(s) behind. The following observations illustrate both arrangements of children in the classroom.

In this class, the curriculum groups sat in two columns, in front of the other 'non-curriculum' group, who sat in a row at the back of the room.

**Observation:**
**Semester 1 (Classes 1 and 3)**

During the first lesson, the two curriculum groups were given work to do from their text books after the teacher had explained it to them. While waiting for

the teacher, one curriculum group worked from supplementary workbooks (bought by their parents) until the teacher set work for them. The teacher explained the work for lesson then gave set work from their textbooks. The older group was comprised of non-Roma plus two Roma children who lived in the main village. A third group, all Roma, which comprised children from both year groups, waited quietly until the teacher came to them. They were all given a picture to colour in of an "ursulet" (bear) after the teacher had explained the letter "u" to them, including what the letter looked like in capital printed letter format. The children's task was finished half way through the lesson and they did nothing for the remainder of the lesson. The teacher shared her/his time in the same way during lessons 2 and 3 and again the Roma group finished before the end of the lessons, having on these occasions been given letters and numbers to copy on sheets of paper.

The above lesson demonstrated that not only were children separated in terms of whether they were considered able to follow the demands of the curriculum but that the activity provided for the non-curriculum group was undemanding and took up much less of the lesson time than the work given to the two curriculum groups.

**Semester 2 (Classes 1 and 3)**

The curriculum group had been given a passage from their text books to prepare for their homework. The group took turns in reading the passage aloud; however, the teacher stood by one Roma child and pointed out the words to her/him. The other Roma child appeared to me to have difficulty in reading aloud, but the teacher gave help when needed. After the lesson I asked the teacher if the two Roma children could keep up with the work. S(he) told me that they both say that they can but s(he) thinks not very much because their mothers had only 4 classes.

The lessons observed in this class were the most extreme, both in terms of lack of work provided and also in terms of the undemanding nature of work

given to most Roma children. For example, the work given to a class 3 Roma child was equivalent to the curriculum followed in the kindergarten. The two Roma children who were included in the curriculum group were helped by the teacher; however, the teacher considered that they could not keep up with the work because of their parents' lack of education. This suggested to me that either the teacher relied on parents to be able to help children at home or else that, as their parents had not achieved more than four years of education, no expectation was placed on the children's ability to cope with the curriculum work.

Other teachers did ensure that the children who were not following the curriculum were given more demanding activities than those described above, as illustrated below:

**Semester 1 Class 3**

Mathematics

Two Roma children worked with the 'curriculum group' while two Roma plus two non-Roma were given different work. The teacher told me that the two non-Roma children were very poor and also were unable to follow the curriculum. Those following the curriculum had a textbook and exercise book whilst the others only had an exercise book in which the teacher had written numbers for the children to copy. All the children appeared to know what to do from the start of the lesson and appeared fully engaged in their work. After teaching a topic to the curriculum group and setting them work, the teacher devoted time to the others, helping them and/or checking their work whilst also keeping an eye on the rest of the class. The board was divided into 2 parts – a smaller part for the 'non-curriculum' group, who frequently went there in turns to write numbers, in tens, consecutively, ascending and descending. They seem very pleased with themselves when they succeeded (as they usually did). The teacher returned to help the other group but was able to work virtually simultaneously with

both groups. S(he) positioned her/himself in different parts of the room during the lessons rather than only at the front, hence was not always further away from one or the other group. The teacher asked questions to the curriculum group, which were answered by someone selected who raised their hand. Neither Roma child in this group raised their hands to answer a question. At the end of this lesson, homework was only given to the curriculum group.

In contrast to the class above, all children in the non-curriculum group were engaged throughout the lesson; however, the Roma children in the curriculum group, in contrast to the other children, did not answers any of the teacher's questions, hence may have been less involved in the lesson.

A "non-verbal communication" lesson was held the same day:

> All children worked together. Children without textbooks were given copies to share. The teacher sat close by them and helped them to look at the right place when necessary. S(he) asked questions of both groups and also asked them to demonstrate such things as 'happy', 'angry' and 'throwing a ball'.

I considered that this lesson was accessible for all children in the class.

## Semester 2 Class 3

> During this lesson the non-curriculum group were doing work appropriate for Class 1. They combined 2 letters such as 'am', 'ma' etc. and in one case were asked to combine 3 "mai" – this was unsuccessful. They worked in exercise books or on paper and also took turns to write the letter combinations on the board. The teacher dictated a Romanian passage to the curriculum group while the other worked quietly in their books. The teacher constantly checked the dictation and, when necessary, helped both the Roma children in the curriculum group. No other child needed help although the teacher checked everyone's work.

The work in Class 3 was much more demanding for the non-curriculum group than the previous class recorded above, although well below the curriculum standard for the year. Also, all children in the non-curriculum group were engaged in their work throughout lessons. When the teacher considered it was possible, s(he) included all the class in the same lesson. However, the standard of work given to the non-curriculum group would not have enabled these children to have the possibility of accessing curriculum requirements during the year and, hence, for the following year.

Although teachers in all observed lessons usually focused first on the 'curriculum' groups, when testing the null hypothesis (see above) by using Fisher's two-tailed test for significance, I found no statistically significant difference at the 5% level in the number of teacher interactions between Roma and non-Roma children within the classes as a whole. The observed difference in interactions in qualitative terms was that the 'curriculum groups' were generally given work first, whilst the other children sometimes had to wait until part way through each lesson before being given attention. In several of the lessons observed, the non-curriculum groups had finished their tasks well before the end of the lesson. Therefore, in such lessons, there was not an efficient use of time for those children who needed more help in order that they could make at least comparative progress with the other children in the class.

During a group interview with six primary school children where no children were following the prescribed curriculum, all wished that they were doing more work at school:

> "I want to work with the other Class 1 children who have books. I have books at home but the teacher still not give me work to take home. I am good at art but I don't want to do art (Class 1).
>
> I want to read and do maths and I want to work at home but the teacher does not give me any (Class 2).
>
> I am not happy doing the same work as the others in Class 1… I think teacher must do more to help me (Class 3).

I want to learn reading and writing (Class 4).

My brother wants to learn English but he doesn't know his letters yet so he can't (Class 4)".

In discussions with children, their talk was centred around their own needs or that of a sibling. The children all wanted to learn more in school and two said that they wanted to take work home. I found it particularly shocking that a child in Class 4 wanted to learn to read and write, thus indicating that in the final year of primary school, s(he) had not acquired these skills, despite her/his eagerness to learn. It was clear that all children cited above wanted to learn more and, I considered from their demeanour, that they were frustrated about their current situation. I also interviewed two children in a second group interview (the parents of the others who initially agreed to the interview withdrew their consent). Both children interviewed were in Class 4 and in a curriculum group. I asked them:

"*What things do you like about going to school?*

One said "to learn" the other "to learn to read". (*After a short discussion they agreed that it was learning* "everything").

*What things don't you like about going to school?*

Nothing *(agreed by both)*".

In contrast with children interviewed from non-curriculum groups, neither child expressed any dissatisfaction with their school life. In class, I observed that both appeared to find curriculum work well within their capability. However, I could have had different reactions from others following the curriculum who found the work more difficult.

A former pupil of the school told me that s(he) preferred junior-secondary to primary school because:

"In classes 1 to 4, I was not taught properly and in classes 5 to 8 I learnt about all sorts of things like Geography and History" (FP2).
*(Both were compulsory subjects in the primary school curriculum)*

FP2 lived within a Roma community, had graduated from junior-secondary school and was attending high school at the time of the interview. S(he) appeared to have had an experience more similar to the non-curriculum groups interviewed rather than the two children above, and considered that s(he) should have received better teaching in the primary school.

The group interviews and that of FP2 suggested to me that children who were not included in 'curriculum' were not only at a disadvantage, as proposed above, but also that these children considered they were at a disadvantage, thus leading to feelings of being educationally neglected and possibly socially alienated.

### 6.1.2.3. Teaching all children the same way

The proportion of Roma to non-Roma children was much lower overall in the junior-secondary departments, partly because the number of Roma children enrolling in primary school was growing, and that of non-Roma was declining and also through school drop-out. At the time of the research the two highest classes had only one or two Roma children who were relatively regular attenders, so these classes were excluded from lesson observations.

Similar teaching methods were used by teachers in quantified lessons, and except for one teacher, those observed were not differentiated according to the level of children's attainment. Lessons observed in Mathematics, Romanian, English, French, Geography, History, Educational Technology and Biology required children to be literate; all followed the same format.

Children were taught by subject specialists and were able to choose where they sat (see appendix 3). Almost all quantified lessons observed started with working through homework questions. The teacher requested an answer to each question and children raised their hands if they knew the answer. A child (with a raised hand) was selected, and often asked to write the answer on the board. Only on one occasion was a Roma child invited to write on the

board. The lessons then followed the format of the teacher explaining the work to be done during the lesson, followed by the children carrying out the work while the teacher either sat at the desk or walked around the room checking the work of some pupils. Then at the end of the lesson homework was given. Some, but not all, Roma children and one non-Roma child appeared to struggle with reading or writing and so in class, did not write down what was given for them to do for homework. Several of these children also appeared not to have a textbook for the lesson and were sharing with another child. It was, I consider, unlikely that they would have been capable of attempting the work at home because it relied on being able to read and understand the questions from the textbook.

An example observation of a teacher who differentiated the work for children:

**Semester 1: Class 5**

> The lesson started with reviewing homework, with the teacher asking children for answers to each question. There were five questions and five non-Roma children were invited to write their answers on the board (there were a total of 19 children present, including five Roma children). No Roma child raised their hand to answer questions. Then the teacher explained the work for the lesson, apparently making eye contact with all children in the class. Children were then asked to read a passage from their textbook and answer questions. One Roma child was given separate work copying from a novel. S(he) was ignored during most of the lesson even though s(he) had stopped writing and either looked at a different notebook or sat with her/his head on the table. The teacher circulated the class checking that the other children were working, although walked past two Roma children who were not doing any work without any interaction. Towards the end of the lesson, the teacher went to see what the Roma child with different work had done, first asking her/him if s(he) had finished. The teacher then praised the work and listened to her/him read, also giving praise.

Working with this Roma child took up 5 minutes of the 50-minute long lesson. Therefore, in terms of time per pupil this child had 10% of lesson time. After the lesson the teacher told me that the child was not yet able to read. This showed that the teacher had recognised the need to give the child work that was better suited to her/his attainment, rather than teaching all the children in the same way.

In a Class 6 lesson, given by the same teacher, two Roma children were given work from a different textbook and appeared to be working throughout the lesson. At the end of the lesson, the two children came up to the teacher's desk and she looked through their work and discussed it with them.

Again, the same teacher as above differentiated the work and gave extra attention in terms of time to those s(he) considered needed different work and consequently extra time at the end of the lesson. Apart from sports lessons where all children were given tasks according to their ability, this was the only junior-secondary school teacher I observed who did not teach all children in the same way, using the same teaching materials.

A contrasting situation is exemplified below:

**Semester 2: Class 6**

> The teacher started the lesson by asking for answers to questions given for homework. Three children raised their hand but the teacher asked for someone else to answer by saying "altceva" (another). No one else responded. The teacher asked all the children to open their exercise books to show what they had done. The first three children (all non-Roma) had done little, if any homework, and so were quietly admonished by the teacher. The next child was Roma, who apparently had not done the homework. The teacher pointed to her/his book and addressed me (in English but in the hearing of the class), saying that s(he) had done very little work and that Roma were lazy and never did their work. The teacher then went to the other six Roma children

present, tapped their head and said: "Roma – no work". After this, s(he) gave answers to the homework and most children wrote them in their exercise books. The teacher then chose some (non-Roma) pupils in turn to read aloud a passage from the textbook. Then, children were told to write answers to questions from the textbook; the two Roma children without textbooks were not asked to do anything and sat quietly throughout the lesson.

The teacher's actions in singling out all Roma children in the class as lazy was the only lesson in which Roma were openly discriminated against. In many other observed lessons, however, Roma children were ignored if they were not doing any work. This was the also the situation for one non-Roma child. Another teacher had quietly pointed this child out to me during a lesson, telling me that the child was like a Roma as there were eleven children in the family and the mother was often drunk. Both above teachers addressed their comments to me, hence the situation would not have happened had I not been observing the lessons. They both, however, displayed discriminatory attitudes towards Roma. The first, by labelling all Roma as lazy, even though the majority of the class had also not completed their homework. In this situation, I considered it was evident to all the class that Roma children were being singled out because of their ethnicity. The second teacher, although making a private comment, not only made a derogatory remark about Roma people but also, by implication, discriminated against another child who apparently had a disadvantaged home background. In over 100 lesson observations, these were the only two occasions when I considered there had been knowing discrimination by teachers.

In contrast, on several occasions, when observing junior-secondary classes, teachers at least ensured that all children had textbooks open in the right place and/or could share a book with another child if necessary. In these situations, children were treated in the same way, regardless of having different educational needs.

Quantitative data were collected from twenty-nine fifty-minute-long lessons. Figure 6.2 below illustrates that in all but one lesson, the mean number of interactions for Roma children with their teacher was fewer than for non-Roma children compared with their peers.
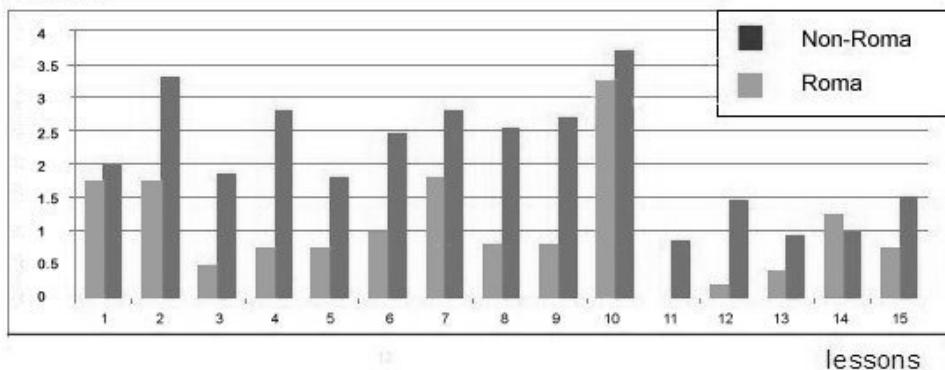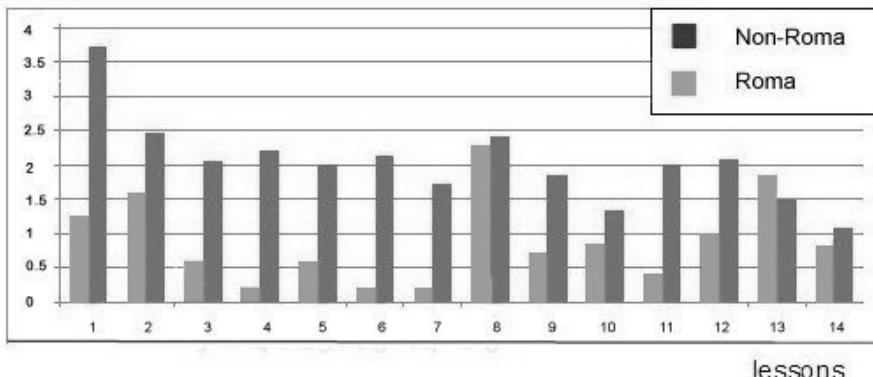


**Figure 6.2.** *Mean number of teacher interactions per pupil per lesson, excluding interactions for bad behaviour*

As well as for the primary departments, I also tested the null hypothesis that Roma children had the same number of teacher interactions as non-Roma children against the alternative that the number of interactions was significantly different. The total number of teacher interactions with Roma children was highly significantly different from non-Roma children (using Fisher's two-tailed test for significance $p<0.0001$). I rejected the null hypothesis in favour of the alternative, thus accepting that there was a difference. Figure 6.2 also

illustrated that this difference occurred because teachers interacted less with Roma children than their peers. The results could indicate that children were ignored because they were Roma, thus Roma children were discriminated against. However, I observed qualitatively that it appeared to be the same few children who were asked by teachers to respond to a question.

When data that included only non-Roma children were analysed, I found that the combined number of positive and neutral teacher interactions with the five children who had the highest attainment in their half-yearly assessment compared with the others was also highly significantly different; this time, with a probability $p=0.0013$. Therefore, I rejected the null hypothesis that high attaining children had the same number of teacher interactions as other children in favour of the alternative hypothesis that the number of teacher interactions was different. This is also illustrated by Figure 6.3, below. (Only 16 lessons were included because these were the only lessons where I could identify the 'high attainers'.)
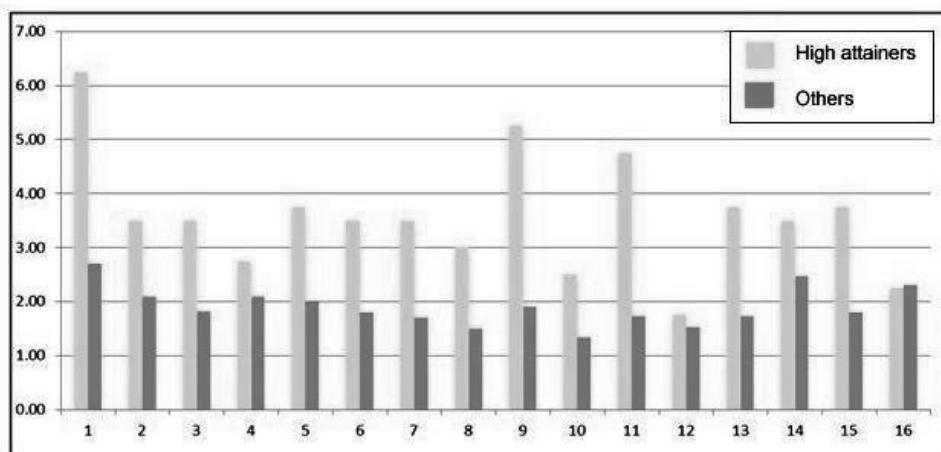


**Figure 6.3.** *Mean number of teacher interactions per pupil per lesson, excluding interactions for bad behaviour(excluding roma pupils)*

A separate study would be needed to test the latter hypothesis as the data were not collected specifically to test this. However, the result allows for a new hypothesis that teachers pay more attention to those children who have

the highest attainment. As all Roma children observed had attainment scores below the median, a lack of attainment, rather than their ethnicity, could be the reason for them receiving fewer interactions. Should this be the case, it would represent indirect rather than direct discrimination.

Therefore, I conclude that further propositions could be made in addition to that of direct discrimination of Roma children because they had fewer interactions with teachers. Firstly, that it was the result of a teaching method where only children volunteering to give answers were selected; therefore, given both quantitative and qualitative observations above, it would support a proposition based on indirect discrimination. Secondly, teachers may have wished to demonstrate to me that all children understood their lessons, hence only selected the 'highest attaining' pupils to give answers.

Unquantified lessons observed included physics, and informatics, where several children were grouped around a single computer while the teacher talked to each group in turn and also sports lessons, when children moved around. In these situations, teacher interactions with individuals could not be quantified, nor did I discern other differences in contact or attitude between the teachers and Roma compared with non-Roma children.

In order to shed light on what happened during 'unobserved' lessons, I interviewed a group of seven Roma children from Classes 5 and 6, in order to obtain their views. This took the form of a discussion after a topic had been introduced, for example:

> "*What do you most like about school?*
>
> *(pause)* I go to school for learning *(A)*
>
> *Do you all agree?*
>
> I go to school for the football (*two others agreed by nodding their heads in the affirmative) (B, C, D)*
>
> I want to learn to read and write and foreign languages (E)
>
> *Are the teachers good at helping? (a chorus of yes)*

*Does anyone think they need more help?*

Yes *(B, D ,F)*

I want to be taught equally but those *(pointing to three children)* are taught better (D)

*(in response)* We get harder work because we are better at learning… teachers take pity on some and give easier work so they get the mark to graduate (A)".

I propose that it was significant that a junior-secondary school child told me that s(he) wanted to learn to read. This demonstrated to me that this child had graduated from primary school regardless of not being able to cope with the curriculum. Children's comments and responses about some getting easier work so they graduated also supported the evidence that some children graduated regardless of whether they were able to cope with the work. Hence, I consider that they would be even less able to engage in learning in the higher class.

All children agreed during the discussion that teachers treated everyone the same although some were more helpful than others.

"Teachers talk to everybody the same – they speak to everybody".

This supported a proposition, made above, that it was the teaching method rather than direct discrimination of Roma children that led to fewer interactions between the teacher and Roma as opposed to non-Roma children. Throughout the interview, no child suggested that they were treated less fairly because they were Roma, even though several felt they needed more help. Therefore, I propose that some teachers had not responded to the needs and circumstances of all children, irrespective of their ethnicity. This proposition was supported by the discussion about missing work and doing homework referred to below:

I spoke directly to one child who had been very quiet during the above part of the interview:

"*You have been away for a little while. Is that correct?*

I was in Paris for two months.

*So is it difficult now to come back to school?*

So and so

*How will you catch up on the work you have missed?*

*(S(he) was quiet for a moment)* I have just lost the work (G)".

I then addressed the group:

"*I want to talk about homework – are you always given the same homework and do you always do it?*

Yes we must do it (A) (*several agreed with this*)

I am too tired (B) *(two others also agree with this)*

*Why do you think some other children don't do their homework?*

Because they don't know how to do it

*And so if they come back and have not done their homework does the teacher help?*

We are not helped how to do the homework we just pass to the next lesson (D) (*there appears to be general agreement*)

*So if you cannot do the homework you just miss that work?*

We are all explained how to do the homework in the lesson".

Given that some teachers had told me that reasons for lack of progress included being absent from school and parents not being able to help at home, no allowance in class appeared to be made for either situation. One child had just "lost the work", while in my observations of lessons, the help given by teachers regarding homework amounted to being able to copy down answers into their notebooks, should their writing skills be sufficiently good. While this did not suggest direct discrimination on the grounds of ethnicity, comments had been made by teachers stating that Roma children were less likely to be able to access help at home for schoolwork and more were likely to be absent. No account was taken of these specific circumstances; therefore, I consider that many Roma children were indirectly discriminated against.

During formal class lessons in the junior-secondary school, I only observed one teacher responding to the needs and circumstances of pupils as opposed to teaching all children the same way, regardless of individual needs. Apart from two occasions there appeared to be no overt discrimination against children because of their ethnicity; rather all children who were not able to access the taught lesson were discriminated against because their specific needs were not taken into account. I considered that these observations were supported by Roma children's accounts of school life.

## 6.2. Contacts between school and home

This section begins by investigating official contacts made by the school for meeting parents, followed by the ways in which teachers encouraged school enrolment for children in the local district. I then explore individual contacts with parents which were initiated by teachers, followed by contacts initiated by parents who visited schools to discuss their concerns with teachers.

### 6.2.1. Official school meetings for parents

Official class meetings were held in school at regular intervals. The schools' director told me about their purpose. At the beginning of the school year, the schools' director told me that:

> "3 parents [are elected] from each class [to] form the 2 parents' committees (*one for each village*).
> At the first [parent committee] meeting they each elect a president who becomes the representative on the administrative board. Village [B] is part of the school structure, that is it is part of Village [A] school which is the main school for the local district. *(This changed later after the junior-secondary departments amalgamated and was situated in Village B)*
> Parent meetings must be held regularly by the children's class teachers. First to vote on the 25% non-compulsory part of the curriculum. Other meetings are for other information about the class and school."

I later asked:

> "*Have any Roma parents been on a parents' committee?*
> *(long pause)* Yes there is one".

Although a government ordinance (MER, 2004) specifically required each county to involve Roma parents in decision making, in this local district only one Roma parent was included in a class parents' committee. This was hugely disproportionate in terms of the relative number of Roma to non-Roma children in the schools. Neither the county school inspectorate nor the schools' director appeared to have addressed this situation. Hence, not only had the ordinance cited above been ignored, but also the lack of representation on parents' committees demonstrated that Roma families were discriminated against in terms of their chance to be a member of the schools' administrative board.

I observed that notices of parent meetings were placed on the schools' front doors. Some teachers also told me in informal conversations that they asked children to inform their parents before a meeting. Neither of these methods, I consider, would have informed all parents. Some parents were illiterate as I discovered when interviewing parents (see above). Also, I observed that not all primary school children were taken to school or met by an adult, and junior-secondary children rarely, if ever, appeared to be met by an adult. Hence, notices of meetings would not be read by all parents. Secondly, neither parents of children who were absent when teachers asked their pupils to inform parents, nor children who forgot to let their parents know about a forthcoming meeting would have related a verbal message. This meant that some parents were unlikely to have been unaware of the dates of all meetings.

In interviews with parents, I asked:

> *Do you attend parents meetings?*

One parent answered:

> "'never' – niciodata
> *Why not?*

> They never let us know when they happen (PG).

And another:

> "We have no contact with school.
> *Why is there no contact?*
> Because of all the children" (PF).

Neither parent suggested that they were not interested in school; the first had not been informed about meetings and the second would have been unable to attend even if they had known. During the interview I observed that this family had four very young children at home. This demonstrated to me that parents' meetings were not accessible for all families, whether or not they wished to attend.

Other parents told me that they attended meetings. For example:

> "I try to attend meetings… I work long hours and [in the past] the mother was very busy with the young children so we had very rarely the opportunity to attend meetings or to visit the school" (PA).

And another:

> "*What contact do you have with the school? Do you come to meetings or concerts?*
> I come to the meetings with the parents, they are important" (PC).

Only one parent (PB) told me that s(he) had chosen not to attend the meetings, although had done so in the past. This was because s(he) considered that the teachers were not bothered with Roma children. Apart from one parent, who was dissatisfied with the schools' attitude towards Roma children, no parent told me that they were uninterested in attending parents' meetings. However, when I asked teachers about contacts with Roma parents, a contrary view was expressed by some. For example:

> "*Do you have contact with parents?*
> "They do not bother to come to the parents' meetings – those parents who do come are not the ones where their children have problems" (TM).

And another teacher:

> "*In the meetings with parents do many Roma parents come?*
>
> Not all of them just a small amount
>
> *Just a few? but of the few do they come regularly?*
>
> They have a programme and they come quite often to school but they are not often at meetings. They are only interested in the money they can get" (TR).

And another:

> "*How often do you meet the parents or have contact with parents?*
>
> Mm I have to contact them at least… one per month
>
> *So you contact them?*
>
> Yes I have parents meetings on Wednesday at 4 o'clock
>
> *I see and so do all the parents come?*
>
> No. I have 16 pupils and on last meeting there were 5 (*8 Roma and 8 non-Roma were enrolled in this class*)
>
> *and of those 5 how many of the parents were Roma?*
>
> None no no no one *(the phrasing of the answer showed that this meant that one attended)*
>
> *So there was one Roma parent and four non-Roma parents?*
>
> *(nods)* Roma parents aren't interested" *(spoken in English)* (TB).

Views expressed by parents compared with those of some teachers demonstrated a lack of understanding by these teachers who either were unaware of, or else ignored the difficulties faced by parents who were unable to attend meetings. Instead, not attending meetings was considered to be because of a lack of interest. A lack of parental interest had also been expressed by some teachers above, in relation to the children's comparative lack of progress. These teachers expressed a derogatory, stereotypical view of Roma people.

## 6.2.2. Encouraging school enrolment

This was considered to be the responsibility of teachers (see previous chapter) and was an important requirement made by the initial policy statements (see Appendix 3 p.3). Teachers told me about the efforts they had made in order to help Roma parents to enrol their children so that their children could attend school: For example, one teacher told me that:

> "Sometime the gypsy parents neglect to enrol the children in school. Teachers find out that when we are there in their area if they [parents] have got all the papers to enrol in the school so that the children came to the school. Those who pass the age to go to school and they still want – there is a school in [name of large town] where there is a kind of 'second chance' but we need it in the local district (TV)".
> *(the 'second chance' scheme is described in the previous chapter)*

Another teacher told me that:

> "We put an announcement in the bus station to the school for the parents of these children to come to enrol their children to school. So, it never happened so I went with my colleague at their places. So we take that em... sheet of paper that they need to enrol their children.
>
> *Yes to enrol the children – .*
>
> We went on the street and started to shout who's got children to go to school there's one, there's another one until they…
>
> *until they find all the children?*
>
> Most of them didn't have the money to make those copies for the birth certificate(s) and so I take all those documents and take them at home and I have a machine that made all those copies. So according to the em system all the paper was alright
>
> *so it was done, yes*
>
> If we would wait after to come to make the papers they wouldn't come
>
> *Are you doing this in the summer holidays?*
>
> Yes – or we were doing the start of the school" (TE).

And another:

> "The parents don't go to school to register the children to attend, so the teachers must to go to the home to try to make the children to come to school. I know some children who don't go to school, they are about 9 years old – I couldn't find their parents. They are not at home and the children then become too old to come to school" (TF).

The above teachers all told me about the proactive methods that were used by teachers in order to encourage enrolment. It also illustrated to me that these teachers were not provided with a list of children of enrolment age and so needed to use their initiative in order to find the children.

An informal comment made to me in the staffroom by TA was that although some parents contacted by her/him agreed to enrol their children, they never arrived at school. This indicated to me that teachers did make efforts to help children to be enrolled in school; it was not always successful. It was impossible for me to quantify the number of children not enrolled in school as there was no official list of all children of school age in the local district. The above teachers' accounts demonstrated that not only was non-enrolment a problem for some children, but also that there appeared to have been no effective strategy or legal instrument to help ensure that each child was enrolled in school. Regulations requiring that legal papers need to be copied by parents would also have made it difficult for many without the personal help given by those teachers who used their own initiatives, funds and scanners. At the time of my field work the school did not possess a scanner.

## 6.2.3. School-led contact with individual families

Two parents, both with junior-secondary aged children, told me that they had received a visit from teachers.

> "*Do you have much contact with the teachers?*
>
> Yes *(said emphatically)* And also I go to the meetings
>
> *How do you know about the meetings?*

The children tell me

*Do any of the teachers ever visit?*

Yes they come

*Which teachers?*

The class teachers and the schools' director and the schools' director is a good person who helps" (PH).

The second parent referred to what happened when a child had missed school through illness:

"*When [name] came back [to school] did they find it difficult to catch up?*

Even now when [name] was with chicken pox, the colleagues and the teachers had taken to her/him what is to learn and s(he) learn at home all the things.

*Is there anyone at all at home to help her/him other than the teachers who come?*

Yes the grandfather, my father.

*What other contacts do you have with the school?*

Only on the parents' meetings… Not with the teachers – when I had problems, the teachers never ask me to come to school *(pauses)*

*...to school to discuss problems?* [nods in affirmation] *Would you like that to happen?*

I would like to have meetings, especially to be – to show about the special abilities or something. If (s)he has special abilities because nothing is negative the child is quite positive about things" (PE).

Both parents were positive about contacts they had had with the teachers who visited them and attended parents' meetings. However, the second parent would have liked to have more meetings with teachers, thus indicating to me that the amount of contact with teachers had not been sufficient.

Some parents told me they had not had a visit; no parent volunteered that they wished to be visited at home by teachers. Although the majority of my interviews were conducted in homes, several parents had preferred to meet me

either at school or, on two occasions, outside their homes. After the interview, two of these parents invited me to come to their homes. This suggested to me that some parents may only wish to be visited at home provided they had given an invitation.

For many teachers, I also observed that visiting Roma at home was difficult because only three teachers lived in the villages and very few had cars. The buses to the major town where most teachers lived were infrequent; therefore, visiting a family could involve an extra four hours away from the teacher's home. However, some teachers, told me about their contacts with individual families without referring to whether they had visited their homes. For example:

> "Unfortunately when they no longer remain at school I have hard work to convince them to come
>
> *You mean dropping out of school?*
>
> Yes, yes unfortunately. I call the parents but unfortunately if the mother and the father are not interested to push them more they have left school" (TJ) *(spoken in English)*.

Another example was recorded by me from field notes:

> "A teacher told me, following an observation session, that a child was not present despite the teacher having contacted the parent several times. The child had been absent for some while. The parent always promised that the child would be back at school the next day but was not. Previously, the child had been a reasonable attender at school. Another parent told this teacher that s(he) thought the child was staying with relatives of her father in another village because there had been a family death" (TA).

Both the above teachers had contacted parents when they had a concern about lack of attendance; however, PA told me that no such contact had been made in relation to her/his eldest child:

> "[Name] did not finish school. S(he) was sent to school each day but very rarely went. S(he) returned home at about the right time and so we

thought s(he) was at school. We only found out when the school decided that s(he) should repeat the year,

*Which year was this?*

It was at the 8th year. It was a shock to us because the school had not mentioned a problem to them before. The school told us only after. It was too late… [name] left school… [and] only can get working on the land or the roads… not an official job… Now we try to attend parents' meetings (PA).
(*PA is also quoted above in reference to attending parents meetings*)

In the above related instance, the lack of contact had had a major impact on the life of the eldest child, to the extent that s(he) was unable to obtain an official job, hence, I consider, would be socially excluded from the official economic life of the country.

Several teachers gave reasons why they did not contact Roma parents, for example:

"Unfortunately we don't have a good connection with the[Roma] parents because the parents avoid the contact with the school" (TC).

TC blamed parents for a lack of contact, even though there was evidence (as given above) that some parents were either unable to attend school or else wished to have more contact. The above comment also implied that TC had not initiated any contact with parents.

Another teacher told me that:

"I have not contacted the [Roma] parents because through their general concept and behaviour (*long pause*)

*So contact with the parents would not make any difference?*

Maybe just a little but not for a long time" (TD).

Both TC and TD expressed negative, stereotypical views about Roma parents, with TD giving these views as the reason for not making contact.

The above evidence emphasised that there was a difference of opinion between teachers; some were prepared to visit parents at home or to make contact to discuss their children, whilst others blamed the parents' attitudes for the teacher's own lack of action. The latter view demonstrated how such opinions ultimately led to PA's child dropping out of school. I suggest that this situation might have been prevented had teachers contacted the parents about truanting earlier.

## 6.2.4. Families who initiated contact with teachers

I found no evidence suggesting that teachers would not see parents who came to the school. On numerous occasions, I observed Roma parents in school either talking to, or else waiting to talk to, teachers. The following field note gives one example:

> Before lessons started, a parent of a Roma child was waiting in the school for the teacher to arrive. The teacher spoke to her/him outside the classroom while the children got out their books ready for the first lesson. The parent then came into the classroom when the teacher wrote out something for her/him on a piece of paper. Then the teacher asked if the child was well-behaved at home; the parent replied "usually". The teacher said that s(he) was always well-behaved at school. The parent was very friendly and the teacher appeared to have a good relationship with her/him. The parent also talked quietly to her/his child, still smiling. On leaving the room the room all children saluted the parent with "Buna Ziua" (*Good Day*). After the lesson, the teacher told me that the parent had asked for a form to be filled in because s(he) could not read or write. The teacher remarked that s(he) had not met the parent before, but meeting parents was always very welcome.

In this case, there not only appeared to be a good relationship between parent and teacher, but also all children, irrespective of ethnicity, treated the Roma

parent with respect. This accorded with my observation in almost all lessons of the friendly relationship between teacher and pupils, regardless of ethnicity.

A teacher also gave an account of a parent who contacted her/him at school:

> "I [also] have a [child] who prefers to go with her grandmother to seek out the garbage rather than to come to school. And I speak with [the child] and I told her/him, here it is warm, we have all the conditions that you don't have home. Here if they are hungry, I give them money to go and buy bread or something to eat… but s(he) prefers to go, s(he) prefers that life.
>
> *Does s(he) prefer it or do you think it is pressure from her/his…*
>
> I don't, no, it's no pressure
>
> Her grandmother comes to me and she is crying and she beg me to convince the girl to stay at school.
>
> *Oh, right, the grandmother wants her to be at school.*
>
> Of course, because the girl's mother is in Germany and she don't know to read and write – she has the example of the mother – nobody employs the mother in Germany because she doesn't have school, the 8 classes, – and I always give her example that is not so good – I don't know how to convince her [about] the example of the mother and learn from it. Unfortunately she is too young and don't realise it. But the grandmother does and yes always comes, [I] always talk with her and I try to convince [the child]" (TJ) (*spoken in English).*

In the above account, there appeared to be a good relationship between the grandmother and teacher who worked together in order to help prevent the child from dropping out of school.

Some parents were unsatisfied with the result of their contacts with teachers; for example, when a parent visited the school to tell the teacher that her/his child was being bullied, s(he) told me:

> "[The teacher] said it was between the children if they fight each other so s(he) cannot help" (PG).

Another parent explained:

> "They never have homework and I have been to school and told the teachers about this many times, but they never do. I asked for them to have textbooks like the other children but they never get any" (PL).

Although PG and PL were dissatisfied with the results of their contacts with teachers, there was no evidence to suggest that teachers were not prepared to discuss individual problems with parents or, as in one case cited above, offer help. However, parents unable to attend parents' meetings may have found it impossible to visit the school when teachers were available to talk to them and others, like PE, may have wished to initiate meeting, but not have had the confidence to make the initial approach.

## 6.3. More important than school

No parents interviewed were from families where no child had been enrolled in school, because I was unable to make contact with any such family. This restricted evidence to interviews with those who had involvement with the schools, personal observations and third-party accounts. Therefore, this section focuses more on children who were more frequently absent from school than non-Roma children or those who had dropped out of school.

Both Roma families who lived in the villages and those from Roma communities, that I visited, lived in poor quality housing compared with local district as a whole. In Roma communities, many houses had no electricity or any form of sanitation. Some households needed to go to the river to wash clothes or to collect water. Houses were often very small, one-room dwellings, where eight or more might sleep in one room, sharing two small beds which were also the only seating in the house. Agricultural machinery and modern technology had replaced most of the traditional family occupations of Roma communities during the time I had lived part-time in the community. For example, plastic guttering had replaced the need for Roma metal workers who had made and fixed guttering on our house, and farm machinery, provided

by EU grants, had replaced jobs previously held by those working on the land.

No parent interviewed suggested to me that they were uninterested in school; however, I consider that receiving such an answer would be unlikely, partly because they knew that I was interested in school education and partly because a parent who was not interested in school would have been unlikely to have agreed to an interview.

There was rarely a single reason why Roma children did not attend school; for example, poverty was one issue that was evident in many of the reasons given to me, but it was not necessarily the only reason. However, I have considered issues separately in order to aid clarity.

## 6.3.1. Poverty: health-related issues

Two teachers told me that Roma children were more frequently absent than non-Roma children because of illness:

> "they [Roma] keep getting sick very often because they don't have good conditions at home – bronchitis and coughs and the body is also a little bit weaker because they don't have very good food and vitamins" (TC).

And also:

> "*Are there reasons why [Roma] children on not at school so much*
>
> The family conditions
>
> *In what way?*
>
> Because they live most of them in one room, they don't have sufficient clothes and their parents don't spend time for their education.
>
> *So it does not matter to the parents whether they go to school or not?*
>
> yes, yes! If he [Roma children] is healthy he comes to school if he's got clothes and food he may come to school whatever it is
>
> *Yes so do you feel that health is particular problem with the Roma children here?*

Yes *(said very emphatically)*

*And why is that?*

It is according to their physiognomy many of them are – they are not too strong – the interests of the parents of the Roma are for their children" (TR).

Both teachers related the comparative poor health to poverty, the second emphasising that parents wanted their children to be at school, provided they are healthy and have food and clothes. Based on these teachers' views, it suggested that some teachers believed that it was poverty, rather than culture or lack of interest in school, that was the driving force for children remaining at home.

Two parents also gave illness as either the main or only reason for their children to miss school, for example:

"Only for major problems or not feeling well. They go to school even when it is raining like today" (PA).

And the other parent:

"Only if s(h)e is ill she misses school and then I take her to the doctor and get a note – children should only miss school if they are ill" (PC).

In both cases the parents referred to children presently attending school. However, both families had an older child who had dropped out of school for other reasons unrelated to health or poverty. PA's eldest child's situation, referred to above, was as a result of the child truanting unknown to the parents, while PC's child was removed by the parent, who told me that the school could not discipline her/him. This child later attended a special school twice a week. In neither case was there any suggestion that parents felt school was not important.

Some teachers, on the other hand, discounted either illness or poverty as a cause of more frequent absences; for example, one teacher told me that:

> "The Roma miss much school. When the parents are valuing the school they send them to school – It is the parents' fault because it is the parents who need educating" (TM).

And another teacher:

> "*What about attendance is there a difference between Roma and non-Roma?*
>
> Yes, there is a difference. It is the parents of Roma, they do not ensure their children go to school – they do not insist. Some Roma children do not attend every day. This is a problem.
>
> *Is this the case with some non-Roma?*
>
> No" (TN).

Also, another teacher

> "The Roma children have more absences than the rest. Most of them are intelligent.
>
> *What are the reasons for the extra absences?*
>
> Lack of interest. It comes from the parents" (TG).

Despite the evidence of parents and the beliefs of the two teachers quoted earlier above, there were teachers who discounted the difficulties faced by poverty and, poor home conditions that led to illness and blamed the parents for children not attending school. This demonstrated a discriminatory attitude towards Roma people, by several teachers, implying that Roma needed to change their attitudes in order for their children to attend school.

Another parent told me that one of her/his children needed to spend time in hospital looking after her/his seriously ill older sibling:

> "The older [one] was in hospital ill for a long time and had to be assisted all the day and night and so the [sibling] failed the year and had only 7 classes and was too old to repeat" (PH).

It was customary for families (regardless of ethnicity) to provide someone available in hospital to help a sick family member (I was aware of this from

prior hospital experiences, including experience as a patient). The role of caring for non-medical needs was not customarily provided by nurses. It was either done by a family member, if available, or by someone paid by the family. This Roma family could not afford to pay someone; hence I consider that it likely that, combined with national regulations regarding repeating a year more than twice, poverty caused school dropout.

A former pupil who dropped out of school told me that:

> I couldn't come to school …there were financial problems and because my father was ill. I had to stay at home.
>
> *Did you look after her father?*
>
> Yes and also I had a very ill brother as well who needed my help… I regret now that I did not finish school.
>
> *Can you tell me what illnesses they had?*
>
> My brother is 18 years old and cannot talk. My father has liver problems and in plus other different things.
>
> *What about your mother?*
>
> She died (FP1).

In both the above situations, family health combined with poverty made it impossible for these children to remain at school. National regulations which did not take into account special circumstances also led to one child not being able to continue their school education. Not only were some teachers discriminatory, as argued above, but in at least one case, the regulations discriminated against the special circumstances of a school child.

## 6.3.2. Poverty: lack of food or appropriate clothing

Parents told me that poverty sometimes prevented children from attending school; for example, from one parent:

> "They like to go to school every day – sometimes when they don't have enough food to feed them or they do not have enough clean clothes and they are on the [washing] line, we don't send them" (PF).

PF told me that the children wanted to go to school, hence emphasising that it was only poverty that was preventing them.

Another parent told me that:

> "They go to the school but sometimes they don't have the right clothes and stuff like the others and the clothing they are sharing, they are ashamed because of the other children. One is now without any sort of footwear *(pause)* the footwear is the problem… They go, they go to the school when they can and with what they have" (PH).
> (*One child was wearing very old plastic flip-flops during the interview while the other was wearing trainers*)

This parent told me that it was not the lack of clothing but its suitability for school in the eyes of her/his children that was the problem, resulting in the children being ashamed to attend to school.

PL arrived with a note written on her/his behalf as shown in Figure 6.4. The parent opened the interview by asking me to read the note, then told me that:

> "We are very poor and sometimes we have no food. I live in a house with one room and no electric. Every morning I need to get up at six to prepare children for school with lighting three candles. That is all I have. If the children are too hungry they don't go to school.
>
> *What about the food given by the school every day. Does that help?*
>
> I do not have food always for them to take for the break like other children – they want to be like the other children
>
> *I notice that [Name] does not come to school as much as the others, is that for different reason?*
>
> [Names] do not mind but [Name] does mind – s(he) feels ashamed" (PL).
> (see Appendix 4 for comparison of these children's attendance record)

**Translation:**

(*name and address blacked out*) I declare that we have a difficult situation, with three children, a single room, without electricity, without water and without [other] services. Because of the difficult material situation it happens that many times we do not send the children to school.

With respect

7/02/2011

**Figure 6.4.** *Note written to me by a parent*

The parent not only referred to the lack of food or clothing but also to a child feeling ashamed. Poverty, therefore, also resulted in these children feeling socially alienated. Feeling different in this way may have been a more potent reason for not attending school than either having no food or what they considered appropriate clothing.

When visiting the Roma community, I observed young children outdoors in very poor clothing; for, example on one occasion I wrote a field note:

> The 5 children were very scantily dressed with only 2 wearing plastic flip flops (the others in bare feet). The girls wore no underwear.

I contend that the above example and other more informal observations made by me in many visits to Roma communities, both before and during the case study, lent weight to the parental contention above, that the clothing they provided was inappropriate for attendance at school.

Teachers also told me that inadequate clothing affected children's attendance in bad weather, for example:

> "Now we have the raining and cold they don't sleep, the raining in the home
>
> *Oh so I see, they don't sleep at night?*
>
> Yes… they don't have clothes, that is a problem a lot of them they don't have the clothes... is wet, all the clothes" (TJ) *spoken in English.*

And also:

> "They [Roma] don't come continuously to school, it is a problem because in bad weather they don't come to school. In the bad weather they have poor conditions – in the winter time they come to school without socks.
>
> *So it's because they don't have the clothing?*
>
> Yes" (TE).

These teachers agreed with parents that poverty was a factor in non-attendance, but that, specifically, it made attendance problematic in bad weather.

During an observed lesson, TQ commented to me that many were away because it was raining hard and "these children" lived a long distance away. S(he) did not distinguish by ethnicity; however, I noted that many Roma children were absent and was aware that children from Roma communities lived much further way than other children. The teacher quoted below, however, did not relate bad weather as a reason for non-attendance:

> "*What is attendance like in the school?*
>
> Romanian and Hungarian children come, they come, they don't stay away from school because it is raining" (TZ).

This section gave further evidence that poverty was an underlying cause of Roma children being more frequently away than their peers especially because of inadequate clothing. However, this situation also induced feelings of shame.

In order for me to examine the relationship between weather and attendance over one year, primary teachers from Village A who recorded daily attendance also agreed to keep a record of the weather, with particular emphasis on when children would be travelling to school. I was therefore able to compare different types of weather with Roma children's attendances over the year (see Appendix 4). Using Fisher's two-tailed test, the difference in attendance for Roma children between wet days (rain or snow) compared with other days was highly significant ($p = 0.0002$). Although this result was confined to primary school children from one village school over the period of a year, it also indicated that wet weather was a reason for less attendance at school. The teachers, however, related this to children not having adequate clothing, which, I propose, pointed to poverty as the underlying cause.

## 6.3.3. Poverty: need to help family (at home and by working)

Teachers related to me that:

> "After they [Roma children] have missed school for a day or so I asked them what happened. The usual answer is they have to take care of the little brothers and sisters because their parents are busy. The children in my class are always very straightforward and are not lying to me" (TI).

And also:

> "I am very lenient because sometimes children like [name] need to stay at home to look after the little children and if they are counted as abandoned then they might need to go to special school and leave their families" (TL).

Also during a lesson I observed:

> "Part-way through the lesson at 0930, a young child knocked on the door and asked for her/his older sibling to be allowed to go home to help. Permission was given".

Another teacher told me that:

> "If they [Roma] are not coming for the next week they visit each home to see why they are absent.
>
> *What reasons do the parents give you?*
>
> They don't have clean clothes, they don't have food, it was cold, things like this. The parents were off there was nobody to take care of the little children
>
> W*here have the parents gone to?*
>
> Usually to go to [Town] for begging… most of them live by this help, even by the community – it is quite a neglect according to the parents to put out children from the first class to look after their babies
>
> *So [some] parents are neglecting their children?*
>
> Yes
>
> *Do you feel that the parents have to neglect their children in order to get money to survive?*
>
> No, those that do it, this is their way of life" (TE).

Two teachers cited above told me that some Roma children stayed at home in order to look after younger children and the third teacher accepted this as a legitimate reason for permitting a child to leave school early. TL also understood the family's need for this; however, TE considered some parents were neglecting their children, thus blaming some of the absences on Roma culture rather than there being a greater priority for a child to be at home rather than attend school. This illustrated a divergence of views between teachers.

When discussing children working outside the home rather than attending school a teacher told me:

"According to the fact that they are very poor and so they have to go to work to get money for their life and for everything, it can be understandable. The parents don't work and it is difficult to get a job if nobody accepts them" (TC).

And another teacher:

"They [the Roma children] frequently miss… when… there is work outside to do in the field, it's their source of getting some money, they work by day to help other people.

*So do they miss maybe several weeks at a time?*

Not so much, perhaps two weeks. In general if they miss long periods they lose the line of the work" (TO).

And also, another teacher:

"All is about the money, everything… and if they don't have money the children when ten years old can go to work, of course the father, he will take the boy and he will go with him.

*to work? simply because he is...*

In the gypsy family, there is no one that has – nobody's working they live on the state, money from the state" (TJ) *spoken in English.*

All, therefore, considered that poverty was the driving force for school being of less importance, with none of the above teachers laying the blame on Roma families.

It was also reported to me that children had dropped out of school and were helping with the family funds:

"*Do you know of children who have left the school but can't read or write?*

Yes there are a few children er in the smaller classes… there are two children in the 5$^{th}$ form, but they have left school… They are now begging to earn a living

*Are they Roma children?*

Yes, yes all of them of Roma children" (TB) *spoken in English.*

A parent also told me about her/his children who had dropped out of school. I asked her/him:

> "*Was there any reason for the older children stopping at class 6 and not going on to class 7?*
>
> The reason was because of the family because of the work.
>
> *The work?*
>
> They go together with me to work on the land
>
> *And that was more important to them than school?*
>
> In spite of all the work they like very much the school" (PK).

TL did not comment on why children chose to earn money rather than remaining at school; however, PK explained that the children were working because of the family and not because they preferred it to school. In this family, only one parent could work as the other was ill. Despite this situation, neither comment above specifically related dropping out through family poverty and so in each situation, it was unclear whether the participants considered that poverty or their way of life (culture) or a combination of both were the reasons for school drop-out.

## 6.3.4. Attending school only to obtain child allowance

All parents interviewed told me that they considered that school attendance was important; however, I had noticed that there were a few children on the school registers who rarely attended school. In several cases, some attended at the beginning of the school year for a few days, then again only a few days before the end of each semester. During a classroom observation in February, I also noted:

> "[Name] was present again today. S(he) arrived at school on Friday. I have checked from the register and Friday and this was the first attendance since September. The class teacher told me that s(he) only attended in order to obtain child allowance".

Teachers told me about other children, for example:

> "Two children who have only been at school once since the beginning of October, arrived on the last day [of the semester] and asked me to sign their "adeverența" (*a form to say they have attended school regularly*).
>
> *Why did they need it?*
>
> This is because the law has reversed again and social money for children of school age can only be paid if they attend school. I refused them" (TA).

And also:

> "Now that they start the social fee, you know, money, now we can see the impact of it… For lots of them it is the income for the family so for them to use it. It is motivation to get the children to school – the family have money for food" (TT).

When I asked the group of junior-secondary school children why some children did not always attend school, they agreed that:

> "some children just go to school enough times so that their parents can collect 'the money'".

The third-party views given above provided some evidence that money was the only driving force for children's attendance at school, therefore implying that families did not otherwise consider school to be important. It was not possible to know from the above evidence how widespread the latter view may have been. However, it indicated that for some Roma families, other factors, for whatever reason, were more important than children's attendance at school.

## 6.3.5. Early Marriage

The schools' director told me that:

> "from Class 6 onwards, with the girls, they start having serious problems because they wish to get married. Very few who start Class 5 finish class 8. One girl who should be in class 8 now is already going around the street pregnant". *(Classes 5–8 are equivalent to junior secondary school which catered for children aged from 11–16 years inclusive)*

S(he) considered that marriage was because the children wished it, however I was given a different motive from a teacher:

> "The girl she is not coming to the school because she has married.
>
> *A girl from 5th class?*
>
> Yes
>
> *How old is she?*
>
> About 13 – the girl that why she married because the father he was very very bad and the girl go to pick the ciggy, the cigarette ends.
>
> *the cigarette ends?*
>
> She must to do for the father because she has such a hard life… to escape from that she knows
>
> *She married to escape?*
>
> Yes, all I know is… that is a way out or is it… I wait to see. She live in a home carton
>
> *In a cardboard carton?*
>
> Yes
>
> *She lives in a cardboard carton with her husband?*
>
> No with the family – now I don't know" (TJ) *(spoken in English).*

As well as the comments made above, I had also met and spoken to several young Roma girls of school age who were married with babies, sometimes together with young husbands. Therefore, I conclude that early marriage was a cause of drop-out for some schoolchildren in the district. I did not know whether this was connected with poverty, specifically related to Roma culture, or was possibly a combination of the two.

## Conclusions

There were many challenges for children, their parents and teachers that needed to be met in the case study area. These included the different disadvantages experienced by some Roma children that needed to be taken into account by

teachers in their classroom practice, for example the lack of kindergarten education compared with non-Roma pupils, whilst parents had difficulties in enabling their children to attend kindergarten. Teachers were also faced with legislation that pre-existed the 'policy', which could run counter to its goal of providing equal access to quality education for Roma children.

All classes were integrated in accordance with 'policy' legislation, in the sense that both Roma and non-Roma children were accommodated in the same class; however, most Roma children were segregated within primary school classes because teachers perceived that these children could not cope with curriculum demands within the prescribed time scales. This disproportionally disadvantaged Roma children's education, especially those who lived in Roma communities. Roma children were therefore more likely to be given less demanding work which took up less of the lesson time; hence, they did not have the opportunity to make as much progress in class as their classmates. Thus, few Roma children who started their school life were able to succeed in junior-secondary school where little or no allowance for children's different levels of school attainment was made.

Parents interviewed felt that school was important and frequently wished for children to be given more help at school, especially parents who were unable to help with schoolwork at home. Children, also, wanted to succeed and frequently wanted more help from teachers especially, but not exclusively those in the primary school, who wanted to be able, at least, to read and write.

I found little evidence of intentional discrimination towards Roma children by teachers. Relationships between Roma children and their teachers were good.

However, stereotypical views were given about Roma by some teachers. This led to some considering that Roma parents were not interested in education and/or that their children did not have the ability to succeed in school. Other teachers, however, understood some of the difficulties faced by many Roma children but there was little evidence that their teaching methods took these into account. I propose that both my observations and reports by children

and their parents demonstrated that the teaching methods used gave the children, who teachers considered were most likely to succeed, the greatest advantage in school education irrespective of whether or not they were Roma. This led to indirect discrimination against many Roma children.

Apart from teachers taking initiatives to encourage enrolment, I found that there were many obstacles to good communication between parents and schools. These included difficulties faced by parents in attending formal meetings and teachers having discriminatory opinions, suggesting that Roma parents were not interested. Little appeared to have been done by schools' authorities to ameliorate this situation; neither had measures been put in place to ensure that Roma parents had proportionate representation on parents' committees.

Poverty was a major driving force behind Roma children not attending school. However, I contend that discrimination leading to educational neglect and/or social alienation were also contributory factors, which were sometimes attributed to poverty. A difference in culture was evident through some children of school age getting married; however, it is impossible to know from my study whether this would have been the case for children whose family had sufficient income and help for their children to remain at school. Whilst factors including poverty, discrimination and culture were all evident on this study, it was not always possible to distinguish between them or ascertain their comparative effects.

# CHAPTER 7. Discussion of research results

The purpose of the research was to explore issues surrounding the implementation of a policy of 'equal access to education for Roma children'. This chapter discusses the findings of my study, which focused on a specific rural self-administrating district of Transylvania covering a time period between 2010 and 2012, towards the end and after the ten-year 'policy'. Through engagement in the field for two years, I was able to explore issues surrounding the 'policy' in thick detail, as well as contributing to the knowledge and understanding of earlier research about Roma education. I relate the results to 'policy' statements, as well as theoretical and empirical findings from the literature discussed in earlier chapters of the thesis.

The Romanian Government 1995 Education Act, which was in force throughout the implementation of the 'policy', stated that it provided equal access to education to all Romanian citizens, regardless of ethnicity. Although the Act gave some guidance on governmental aims for education, it fell short of making reference to multi-cultural and integrated schools or inclusive education (Romanian Government, 1995). This was redressed by the 'policy' contained within the ten-year strategy for 'Improving the condition of Roma people in Romania' together with consequent MER ordinances. Their 'policy' objectives were to prevent discrimination (including stereotypical attitudes), encourage attendance, integrate schools and classes, train teachers in inclusive methods, include Roma history and culture in the curriculum and involve Roma parents in schools. In order to help facilitate the above, Roma mediators, working within a school and Roma communities, were to be employed. The 'policy' was modified during its ten-year implementation. For example, in 2001, as well as preventing discrimination, the focus was on measures to encourage attendance; whereas in 2004, segregated schools were recognised as being discriminatory and so measures were taken to integrate schools. Also, school inspectorates were instructed to make a plan in order to implement 'policy'

strategies. In the 2007 ordinance, as well as integrating schools other than in exceptional circumstances, there was a focus on inclusive education, which also included a list of inclusion indicators. In order to help prevent discrimination, it also referred both to sanctions and a constructive approach to discriminatory acts by teachers or pupils.

The following sections discuss 'policy' measures outlined above and to what extent they were successful. The final section investigates some reasons why participants either lacked knowledge or were sceptical about 'policy' intentions.

## 7.1. Encouraging school attendance

The chief schools' inspector told me that the inspectorate tried to ensure that all children attended until they were sixteen. The importance of encouraging attendance was also understood by teachers, for example, TA, TE and TF who, despite the difficulties parents had in complying with laws regulating school enrolment, were proactive in helping parents to enrol them. Difficulties in complying with school regulations for enrolment were reported by McDonald (1999) and (EUMAP, 2007a), who proposed that it made it difficult or impossible for many Roma children to enrol in school. However, Colebatch (2009) (whose authoritative model of policy I adopted) contended that when designing a new policy, there was a need to consider how its actions would fit into existing policies or commitments. My findings suggest that no such action had been taken by the government to respond to this pre-existing situation; nevertheless, teachers had helped parents overcome such difficulties, thus contributing towards 'policy' success.

The situation was less clear with respect to helping children remain at school. For example, teacher TJ, told me how s(he) had tried to convince a child to stay at school but on the other hand parent PA, told me that no teacher had contacted her/him when their child was truanting school. Nevertheless, no participant had suggested that Roma children should not be encouraged to

attend school. My findings above suggest that participants' perception of the meaning of 'equal access to quality education' in terms of children attending school excluded the deficit viewpoint either of a relativist ethnocentric approach to education as described by Vargas and Gomez (2003) and Horvath and Toma (2006), or of children being ineducable, an extreme aspect of a deficit category proposed by Valencia (2010). Hence, according to Fullan's (2007) theory, participants' common worldview contributed towards the success of this aspect of the 'policy'. However, frequent absences from school, were perceived to remain because of poor home conditions, such as lack of food or clothing problem: perceptions of both teachers and parents, for example, TC, TR, PF, PH, and PL. According to TE and TJ, this also led to children not attending in bad weather. Another factor related to children staying at home to look after younger siblings (TI, TL) or else working because the extra income was needed (TC. TL, TO).

The above reasons for absences accorded with those given in the literature regarding Romania and other European countries (Save the Children, 2001c; FRA, 2014; Symeou, 2015). WB (2014) also contended that, in Romania, determinants of school dropout and non-enrolment among the Roma were mainly economic. However, not every reason proposed by participants may have exclusively related to poverty, for example, early marriage as proposed by the schools' director and TJ. I did not interview parents from the community with children who never attended school, so my findings may not be a reflection of the situation of all Roma children in the case study area. However, I argue that they indicate that in many situations, encouragement to attend school needed to be addressed by social rather than educational policy.

## 7.2. Understanding discrimination

### 7.2.1. Integrating schools

The case study schools were integrated, in the sense that no class contained only Roma or non-Roma children. This change had been made two years

prior to the introduction of the 2004 MER ordinance to integrate schools. The local mayor also encouraged parents to send their children to schools where all children were taught together. A teacher linked preventing discrimination with integrated schools and, with the exception of TP, my findings suggest that the 'policy' of integrated schools was either accepted as a positive measure or else taken for granted by all participants in my study. However, apart from members of the administration, participants did not include non-Roma parents who may have held a different view; nevertheless, many non-Roma children attended the schools alongside their Roma peers. In contrast, Cozma *et al.'s* (2000) study, found that non-Roma parents had refused to send their children to a school containing Roma children, even though, like the case study district, there was no other school in the area for children to attend. Their conclusions were that because of the negative attitudes of the majority population, there would be little opportunity for schools to become integrated.

## 7.2.2. Discrimination within schools

Whether or not they related integrated schools to a 'policy' objective, teachers such as TD, TN and TO understood that it meant that Roma children must not be discriminated against. However, various stereotypical attitudes were expressed to me by teachers such as TI, TN, TP, and TZ, as well as the schools' director. These attitudes were also reported by former pupils such as FP1 and FP3, and parents, PB and PD. Not all teachers expressed such views to me, but their attitudes may not have surfaced in interviews. Liegeois (1998) reported discrimination of Roma by teachers in much earlier studies from ten western European countries, while stereotypical views such as those cited above were also reported in later findings, for example Horvath and Toma, (2006), EUMAP, (2007b) and Rosinsky *et al.* (2009).

On the other hand, Payne and Prielers' (2015) study found that more than half of the teachers enjoyed teaching Roma children and did not view them as a specific problem compared with other children, whilst others expressed

stereotypical attitudes. However, their study considered the views of teachers in the context of an English education system and migrant Roma families, as opposed to that of Romanian Roma children being taught within their own country's educational system. My findings, however, did not provide sufficient evidence to know the extent to which teachers viewed Roma as a specific problem compared with other children.

One teacher TM, stereotyped Roma parents as being 'the problem', nevertheless spent extra time with children who had difficulty with reading and writing and told me later in an informal conversation that s(he) treated each child in the way s(he) would want her/his own children to be treated. In all observed lessons, I contend that her/his teaching conformed to the provision of inclusive education as defined by Pather, (2007), which referred to quality appropriate education which incorporated the needs of all learners. On the other hand, TI had a made a positive non-stereotypical comment to me about Roma children; yet, in one lesson, made discriminatory remarks about Roma hence displaying in action as opposed to words a deficit perception of Roma. Such differences between what teachers said and their actions in class are significant and highlight the importance of using observations to better understand complex issues in education.

Stereotypical remarks also were made by key people in administration, for example the chief inspector, the local mayor and the social worker. Toma (2012) in a study of social workers working in rural communities, found that they expressed similar views when asked what measures should be taken to improve the situation of Roma. For example, she reported that respondents agreed that "Roma people should be more diligent" or "have a greater will to improve" (Toma,2012, p.205). Cozma *et al'*.s (2000) study, cited above, also reported stereotypical remarks made by non-Roma parents. According to Liegeois (2007b), there was a widely-held view of 'blaming the victim' with respect to Roma education, while Valencia (2010) described victim blaming as an aspect of deficit thinking. I argue that such deficit views of administrators

and some teachers would have had a negative effect on 'policy' implementation in the case study district.

In primary school classes, grouping children into those that the teacher considered were able to follow the curriculum and others, who were given less challenging work, had the effect of stereotyping the majority of Roma children as not being able to cope with curriculum requirements. This especially affected those who lived in Roma communities as opposed to within a main village. These findings were supported by both classroom observations and children's comments. Other research in Europe had also found that Roma children were given less challenging work in lessons compared with their classmates, which resulted in Roma children making comparatively less progress (Horvath and Toma, 2006; Symeou *et al.*, 2009b, Flecha and Solera, 2013). This occurred despite children wanting to be given more help (OSI, 2001; Symeou *et al.*, 2009b). I therefore conclude that in Roma children being given less challenging work, my findings in primary departments accorded with the research cited above.

However, in other research studies, Roma children have been reported as being placed at the back of the classroom and ignored or else given less attention (Save the Children, 2001a, 2001b, 2001c; Gobbo 2009; Fleck and Rughiniş, 2008). On the contrary, in the case study area, there was no evidence to suggest that Roma children sat at the back of the classrooms in the junior secondary department (see example seating plans in Appendix 3), and only in one out of the five classes observed in primary departments were Roma children seated towards the back.

In no observed lessons were all Roma children ignored. In primary school departments, there was no significant statistical difference at the 5% level in the number of interactions between teachers with Roma compared with non-Roma children, even though in groups predominantly containing Roma children, the children spent less time on their work. In the junior-secondary department, Figure 6.2 also demonstrated, that in the 29 lessons where

interactions were quantified, there was no lesson where all Roma children and ignored and this was the case in all other lessons. However, quantitative observations of teacher interactions in junior department classes showed that Roma children did have significantly fewer teacher interactions than other children ($p < 0.0001$). When partialling out Roma children, statistical evidence suggested that children with lower attainment levels had significantly fewer interactions with teachers ($p=0.003$). As the attainment level of all Roma children was below the median, I argue that an alternative hypothesis could be posed, that teachers have more interactions with the highest attaining children independently of whether or not they are Roma. Therefore, contrary to the literature reported above my findings suggest that, at least in the junior-secondary department, teacher interactions may have been related to a child's level of attainment rather than to their ethnicity.

However, this did not preclude direct discrimination of Roma in other ways. For example, views were expressed to me by parents PB and PF, former pupils FP1, FP3, and a teacher TC that teachers were not interested and were less concerned about children because they were Roma. No parent or child, however, told me that teachers were unfriendly towards them, with FP5 telling me that although one teacher was racist, all teachers were nice to them. However, FP1 qualified this, by telling me that teachers were nicer to "Romanians" because they helped them more. Schoolchildren interviewed all told me that they were treated the same but some added they wished to have more help. Apart from one incident reported above, I found that teachers displayed a warm and friendly relationship with children and from the children's responses to teachers, contend that this relationship had not been 'put on' for my benefit. Brown and Rodriguez (2009) proposed that some children in schools experienced educational neglect because schools did not provide help, while Fine (1991) referred to some children reporting that teachers lacked interest in them. I contend that Brown and Rodriguez's (2009) findings accorded with mine regarding the lack of help; they also, in this way, accorded with Fine (1991). I argue that while my findings show

that teachers discriminated against Roma children by holding stereotypical views of Roma, they also suggest that in many situations, there was no knowing discrimination of children solely because they were Roma. This relates to Spillane's (2004) theory of misunderstanding a policy, in that teachers, who knew that the 'policy' meant they must not discriminate, did not understand that stereotyping people was a form of discrimination.

## 7.3. Inclusive education
### 7.3.1. Understandings of inclusive education

In 2004 the 'policy' referred to the need for schools to be inclusive but it was only three years later that 'inclusive schools' were defined, together with a list of inclusion indicators (See Appendix 2). The schools' director was the only participant who described equal access to quality education as meaning having inclusive schools including that the educational service needed to adapt to children's needs and not vice versa. Thus, I propose, that in theory s(he) accepted the definitions of inclusion given by Clough and Corbetts' (2000) sociological perspective, where the focus was on improving schools to accommodate and meet the needs of all pupils, Pather (2007), who contended that inclusive education must incorporate the needs of all learners, and the EFA goal, which referred to responding flexibly to the circumstances and needs of all learners (UNESCO, 2000). However, s(he) also held a stereotypical view of the ability of Roma; hence, I argue that her/his understanding of 'equal access to education', while accepting the above definitions of inclusion, would not have included an expectation that in doing this, Roma children would make the same progress as their non-Roma peers. This view accorded with Valencia's (2010) category of deficit thinking of the belief in an inferior culture or genes.

The above view was in contrast with that of the chief schools' inspector, who was responsible for 'policy' implementation within the county and held the deficit view that it was up to Roma children to learn and also that teaching

methods were unrelated to the 'policy'. Hence, the findings suggest that her/his view of equal access to quality education, in contrast with the schools' director, excluded the need for inclusive schools as defined above, but accorded with the deficit view of ethnocentrism, which Liegeois (2007b) described as 'victim blaming'.

Although teaching children in different groups in the primary departments (see above) may have been perceived by teachers as incorporating the needs of all children, in the junior-secondary department, in all observed lessons, apart from TM cited above and sports lessons, children were taught together in the same way and given the same work to complete, regardless of whether or not they had understood. Findings above also indicated that its effect may have been that those pupils, irrespective of ethnicity, who were the highest attainers in a class received the most attention in terms of teacher–pupil interactions.

As indicated in Table 2.1, in the 1990s, the WB had advised the Romanian government on educational policy. However, Samoff (1996) proposed that the WB view of education considered that 'equality' was related to 'sameness', meaning that children were not treated preferentially. Also, one of the definitions of 'quality' posed by Adams (1993) meant concentrating on those most likely to achieve excellent results in attainment tests. Freyberg-Inan and Cristescu (2006) and Chircu and Negreanu (2010) contended that in Romania, teachers continued to teach in the same authoritarian way that had been taught prior to the democratisation of education, which Rado (2001) described as concentrating on those children most likely to succeed. I argue that the findings of lesson observations indicate that Samoff's (1996) definition of the meaning of 'equality' was understood by almost all junior-secondary school teachers and that its effect may have been to provide 'quality' education as defined by Adams (1993). It also related to the authoritarian style described above. Therefore, I argue that the method of teaching usually followed in the junior-secondary department was incompatible with inclusive education as defined above and as outlined by the 'policy' inclusion indicators (Appendix2).

Teachers, for example, TE and TH, recognised that many Roma children were unable to receive the level of family support for school work available to non-Roma children. However, in the junior-secondary department, I did not observe that any allowance was made in accommodating the needs of children when setting homework or if they had missed work through absence. This was confirmed to me by children. Only one parent, PE, had reported to me that a teacher had visited her/him and provided work for her/his child because the child was away from school.

In her survey of UK children, Hartas (2012) found that mothers whose family income was in the lowest 20% were less likely to have the capability to make home learning effective. This, I argue, accorded with my findings regarding Roma parents. However, Vrasmas (2001) contended that in Romania, traditionally the family was very involved in the school education of their children and often provided resources to supplement their education. Whilst, from my prior knowledge, this is still the case for some non-Roma families, I suggest that for others, whatever their ethnicity, this may not be possible. I argue, from the findings above, that teachers needed to take more account of such circumstances for all children, in order to comply fully with the 'policy' objective regarding inclusive schools.

## 7.3.2. Inclusive education and existing regulations

The schools' director told me that it was important to comply with the national curriculum and that after each lesson, teachers had to record what they had taught. This was then checked regularly by the inspectorate. Her/his explanation was supported by comments made by teachers such as TA, TC and TI, who told me that they needed to comply with the national curriculum within a strict timetable, with TA telling me that this was regardless of whether or not the children understood. I had also observed that teachers recorded what they had taught and that inspectors had visited a school to check these. I argue that these official procedures, accorded with Rado's (2001) description

of former communist countries when the focus was on the teacher and the curriculum as opposed to individual children. Thus, it bore little relationship to the 'policy's' inclusive indicator 19 (see Appendix 2), which suggested that teachers should compare each child's individual progress with their projected performance.

Existing legislation at the time required children to have ten years of schooling. At the same time, they also had to have reached a satisfactory level and/or not have too many unauthorised absences in a year before being able graduate to the next class. Failing to graduate meant the children needed to repeat the year; however, no more than two years could be repeated. The problems for children, affected by these conflicting regulations, were explained to me by TD, TF and TP who graduated children to the next class even though their grades were not good enough or they had had too many unauthorised absences. This they considered was in the best interests of individual children. TC informed me that s(he) needed to falsify the records for this purpose. I also confirmed that other teachers had done this. I propose that graduating children regardless of whether they were able to access the following year's work, while preventing children from school exclusion, resulted in their being disadvantaged by falling even further behind their classmates. In Romania, similar conflicting school regulations were reported (McDonald, 1999; CEDIME-SE, 2001; EUMAP, 2007a). I argue that because these regulations remained, they were contributory factors in preventing some children from having equal access to quality education in the case study schools. Hence, Colebatch's (2009) contention that a policy needed to consider existing policies was as relevant to the above findings as to the difficulties of enrolling children, referred to above.

Freyberg-Inan and Cristescu (2006) proposed that in Romania, teachers did not wish their activity to be judged by new regulations; however, I argue that my findings show that, rather than not wanting to be judged by new regulations, teachers for example TC, TD, TF, and TP balanced their knowledge about existing regulations together with the 'policy' objective of 'encouraging school

attendance' in order to provide what they considered to be in the best interests of children.

## 7.4. Further 'policy' objectives
## 7.4.1. Teacher training

The 'policy' required that the schools' county inspectorate organised training for teachers in inclusive education (MER, 2004). In interviews, no discussion of teacher training was initiated by members of the inspectorate, although a Roma inspector told me that such courses were provided by CDD. Such a course was difficult to locate and its syllabus content was theoretical and made no reference to 'inclusive' or other teaching methods. Only two teachers interviewed were aware of this course or any other such course, although TV considered that a course such as that defined by the 'policy' was a good idea. Based on what the teacher, who had attended the above course, had understood, they were told to treat everyone the same, giving extra help when needed (TF). I argue that TF's understanding of this related to the 'historical psycho-medical legacy' of inclusive education, as defined by Clough and Corbett (2000), which referred to children being given remedial help. Plainer (2014) and EUMAP (2007b) further reported that extra help in schools was only available for children if they were certified as having a mental 'deficiency'.

Duminică and Ivasnuic (2010) found that teachers would have liked to attend courses on inclusive education and reported they were provided by PHARE and other NGOs. I argue that my findings suggest that such courses were unknown to teachers in my study, hence they did not have this opportunity to learn about inclusive education.

## 7.4.2. Involvement of parents in schools

The schools' director told me that schools held regular meetings for parents; however, contrary to 'policy' intentions, Roma parents were hugely under-

represented in school decision making, with only one Roma parent having ever been elected to a parents' committee. Parents' meetings were announced by written notices on the school doors, hence this would have created difficulties for those parents who were illiterate; (see also TE). Some parents confirmed to me that they were either unaware of or else unable to attend these meetings; for example, PF and PG. More than forty years prior to my study, Plowden (1967) had reported that the number of meetings with parents organised by the school had an impact on a child's success; however, in my case study, the organisation of such meetings precluded attendance for some Roma parents.

Teachers had made contact with parents in other ways as reported by PH and PE, although PE wished to have more contact. While there was no evidence that teachers would have not welcomed parents who visited schools, many Roma parents had had little or no personal experience of attending schools as pupils as well as having a different cultural background from the teachers. Reay (2006) and Flecha and Solera (2013) found that such factors made involvement with schools more difficult these parents than for others.

In my study, the schools did not have a Roma mediator (a 'policy' objective) whose role included "facilitating communication between the school and Roma parents" (Rus and Zatreanu, 2009, p.9). Although some were employed in the county, they were initially financed by a PHARE project and then by local districts. However, the local mayor, who was on the schools' governing board, head of the education commission and responsible for local district funding, appeared to be unaware that a Roma mediator was part of the 'policy', hence would have neither applied for the schools to be included in a such a project nor applied for grants to cover subsequent funding.

WB (2014), in their policy advice for supporting Roma inclusion, referred to there being insufficient numbers of Roma mediators employed throughout Romania. The sparsity of Roma mediators in Romanian schools was also referred to by Duminică and Ivasnuic (2010), who found that where schools were provided with one, the advantages included improvements in parent-

school relationships and teachers' increased understanding of Roma communities. However, it was not possible for me to know whether or not the employment of a Roma mediator would have improved the involvement of parents or parent-school relationships in the case study schools.

## 7.4.3. Roma history and culture

I confirmed with TA that Roma history and culture were neither included in the school curriculum for primary school classes, nor included in their textbooks. In the junior-secondary school, teacher TG also confirmed that Roma history and culture was not written in their school history books, whilst TI told me that there was no opportunity in school to learn about these topics before reaching high school. No other participant in my study referred to this aspect as being part of the 'policy'. Promoting ethnic identity, including in the curriculum, was a 'policy' objective (Appendix 2); however, the curriculum and textbooks were the government's responsibility. Hence, without governmental action, the objective of including Roma history and culture in the curriculum and school textbooks could not be realised.

EUMAP (2007b) proposed that minority groups such as Roma should be able to recognise their own culture in school programmes. Also, several projects linked by the INSETRom programme had been designed to help meet a perceived need to include Roma culture and history in schools' curricula (Symeou *et al*, 2009a). Gobbo, (2009), who was involved in one such project, observed that not only did teachers lack knowledge in the subject, but also, they wanted to meet the challenge of being able to teach Roma history and culture. I propose that teachers in the case study district had no knowledge of the objective to promote ethnic identity in the curriculum and, apart from one teacher cited above, had received no training in teaching children in an intercultural setting. Therefore, they neither had considered it to be a part of their role, nor had they been offered the opportunity to realise it.

## 7.5. Lacking knowledge and/or scepticism of the 'policy'

The previous sub-section has already referred to some 'policy' objectives that were unknown to participants; however, when parents were asked about a policy of equal access to education only PC indicated that they had any specific knowledge. Otherwise, only PE and PL told me that they had heard about the 'policy' but did not know any details. Some parents such as PE, did tell me that they felt that their children needed more help in school. This view was also expressed by the local district's Roma representative. I argue that, despite a lack of knowledge of the 'policy', these findings indicate that their views on 'equal access to quality education' accorded with those of inclusive education as defined by Pather (2007) and the EFA goal, referred to above and what Clough and Corbett (2000) referred to as the need for 'school improvement strategies'. This, I argue, is because they considered that it was the schools that needed to change to accommodate their children as opposed to their children being 'deficient'.

Some teachers also either had little, if any, knowledge of the 'policy', for example, TF, TP and TS, or had only heard of it unofficially, while others, such as TE, TJ and TZ, were sceptical of the government's intentions. TA also told me that s(he) understood that it related to the government's conforming with EU standards, while TJ considered that the 'policy' was too good to be true and both s(he) and TZ said that 'equal access to quality education' were just words or statements made by the government. Following Romania's acceptance as a candidate for EU membership, they needed to introduce an educational policy to improve Roma education, based on EU requirements (EC, 2003; Ionescu and Cace 2006; Pusca, 2012). In this context, EUMAP (2007a) also produced a monitoring report on 'equal access to quality education for Roma'. Hajisoteriou's (2010) findings, in Cyprus, regarding intercultural education at ministerial and school level, concluded that the EU had affected the discourse of policy-making at a ministerial level, while Grabbe (2003) proposed that the EU exerted considerable power and influence over former

communist accession candidates. I propose that my findings regarding the teachers' opinions expressed above suggested that they felt that it was external pressure that was the driving force behind the 'policy' rather than a governmental intention to improve the situation for Roma children.

TE, however, told me that the government did nothing (regarding the 'policy') yet approved of a 'policy' measure which had resulted in improving attendance. Hence, I argue s(he) was unaware that this was part of the 'policy' strategy. In contrast, TV suggested that, although not knowing its details, the 'policy' was welcome, but the commitment must be made by the teachers and community. This related to a project described by Flecha and Solera (2013) where priority was given to involving both teachers and the Roma community in the learning process; the authors proposed that "Schools and communities may have a key role in reversing the cycle of inequality that the Roma suffer in Europe" (p.451). The study, however related to one school rather than to its being adopted as a government policy.

Popenci (2008) contended that policies were disregarded because of the many contradictory educational reforms made in Romania as a result of frequent changes of Ministers of Education. However, I argue that rather than being disregarded, many aspects of the 'policy' and its intentions were unknown by teachers because information had not been disseminated directly to the schools by the inspectorate or made available in an easily accessible form by the government. The only person who knew about the 'policy' in some detail was the schools' director, as reported above. However, I consider it noteworthy that, unlike members of the inspectorate, s(he) had held such a position from before the 'policy' began. S(he) also had internet access to government initial 'policy' statements and subsequent ordinances, unlike other participants. I argue, therefore, that s(he) had continuous access to 'policy' information as opposed to other participants in my study.

# Conclusions

The 'policy' had had some positive effects on perception and practices. With few exceptions, teachers appeared, at least, to not knowingly discriminate against Roma and all participants felt that Roma children should attend school. Some measures were taken by teachers to help ensure this, although it was unclear whether or not this was a result of 'policy' directives'. Perceptions of the 'policy' by participants differed from not knowing about it, being sceptical of its intentions, and only having partial knowledge. Only the schools' director appeared to understand 'policy' intentions. Different worldviews between 'policy-makers' and participants were evident, as well as misunderstanding of what the 'policy' meant by 'discrimination' and, as proposed by Fullan (2007) and Spillane respectively, I argue that these had a negative influence on the success of the 'policy'. However, I propose that a combination of lack of knowledge and lack of an effective implementation of the 'policy' on the part of the MER also had a profound effect.

'Policy' implementation was designed to be partly funded by projects from NGOs, including international organisations, but these projects were not carried out in the case study schools. Rural districts of Romania, (like the case study district) were not only poorer, but also only 10% of NGOs operated in rural compared with urban areas (Save the Children, 2001a). This, I propose, put the case study schools at a disadvantage in implementing some 'policy' objectives such as training teachers in inclusive education and employing a Roma mediator.

The reasons for children not attending school, or attending less frequently, were usually attributed to poverty. I propose that some of the difficulties relating to poverty could be addressed by the social care part of the strategy to improve the condition of Roma, which, I suggest, would have a positive impact on improving access to education. However, I had little evidence about children who had never attended school because I had not been able to contact their parents; therefore, this part of the case study was not sufficiently researched by me to make adequate inferences.

Stereotypical attitudes remained for at least some non-Roma participants, which had the effect of assuming that Roma children would achieve less in their schoolwork compared to their non-Roma peers. This was despite the recent 'policy' ordinance, which required teachers to check that comparative progress of all children had been made, helped by giving targets for children's future progress.

# CHAPTER 8. Conclusions

The purpose of the research was to investigate what was happening on a day-to-day basis in a school environment following the implementation of a ten-year policy designed to achieve equal access to quality education for Roma children. This way recommendations for both policy makers and practitioners can be made. I chose an interpretive approach that focused on a case study of a rural, local, self-administered district in Transylvania. Data were taken over the two-year period towards the end and after the completion of the strategy. Classroom sessions were observed in all five school departments, using both qualitative and quantitative methods. Interviews were held with teachers, parents, children, former Roma students and local and county administrators. Group interviews were held with Roma pupils, field notes were taken and documentary evidence collected. Data were analysed using thematic analysis with NVIVO 8/10 aiding the coding of data prior to the development of themes, which were then used to answer the research questions. My research questions were:

> *What are the perceptions and practices in a rural Transylvanian community that affect the realisation of the Romanian Government's policy to achieve 'equal access to quality education for Roma children'?*

Sub-questions:

1. *What are the stated perceptions of the county school inspectorate, local council administrators, teachers and parents of the policy to achieve equal access to quality education for Roma?*
2. *What are the current practices in the case study area that affect the realisation of the 'policy', regarding the education of Roma children?*

My study built on published research relating to the history of Roma, Roma education and findings with respect to education of children, relevant to my case study. It also took into account the specific context of education in the

Transylvanian region of Romania, including its emergence from communism to democracy and consequent reliance on help from the international democratic community, in particular the EU. A major research report in Romania which was published after the start of my fieldwork also considered 'equal access to quality education' in Romania although, it did not investigate the extent of the implementation of the government's 'policy' (Dumincă and Ivasuic, 2010). Whilst this report added weight to some of my own research findings, their research did not focus on school processes through the observation of classroom realities that teachers and pupils experienced; rather, it relied only on accounts by teachers and Roma mediators and answers to questionnaires.

The first section of this chapter considers what has been added to existing knowledge about Roma education and the implementation of a policy of 'equal access to quality education for Roma children' in primary and junior secondary schools. I next consider the limitations of the study, before discussing the extent to which its results and analysis enabled research outcomes to inform stakeholders in education, in order to help improve the education of Roma children. The final section, provides some recommendations for both policy makers and practitioners, taking account both my findings from the research study, later policy ordinances and international reports in order help improve the education of Roma children.

## 8.1. Relevant findings from the research study

I propose that my study added three distinct but connected elements to existing knowledge about the education of Roma children at primary and junior-secondary school level. These relate to:

- classroom practices
- the relationship between home and school
- how a policy, which was designed to work towards achieving equal access to quality education, was understood and implemented.

In the classroom, teachers needed to cope with the demands of conflicting regulations which adversely affected Roma children, as well as the priority of meeting strict curriculum requirements within a class that included children with a wide range of previous educational experience and advantages, including whether or not they had attended kindergarten and who had different cultural experiences. I argue that the ways in which the teachers met the above challenges created a substantial disadvantage for most Roma children compared with their non-Roma peers. It also made the transfer from primary to junior-secondary school particularly problematic for these children. In primary school, Roma children were more likely to be given easier and less demanding work with no homework; hence, they had less opportunity to meet the necessary curriculum requirement in order to progress to a higher class. However, teachers often disregarded this requirement when it could mean that a child would need to leave school altogether after two years of repeating classes (under a different regulation). The result was that every year the majority of Roma children fell further behind the required curriculum level. For them, this situation made the transition to junior-secondary school a much more daunting task. In junior-secondary school, all children were usually taught the curriculum in the same way and were given homework, with little or no help or allowance made for children who did not understand the work. Those children with the highest attainment level were given the most attention in terms of having a greater number of interactions with the teacher; hence, I propose, children who were already disadvantaged following the transition from primary school were at an even greater disadvantage.

The thematic analysis of the Roma parental/school interface added weight to earlier research on the importance that parents' and/or teachers' attitudes had in affecting the education of children, for example, Plowden (1967), Rosinsky *et al,* (2009), Flecha and Soler (2013) and Payne and Prieler (2015). These studies, combined with my findings, provide evidence that is useful for informing projects designed to help improve education for Roma children, by recognising a need for teachers to avoid stereotyping Roma children and

their families, as well as having a greater understanding of their home circumstances; also, that it is beneficial for parents to become involved with their children's school education. My research, however, I propose, considered that it is the interface or partnership between home and school that is also an issue to be focused on rather than viewing different attitudes and actions of Roma families and schools separately in order to improve the situation for Roma children.

Alternative perceptions of the 'policy' and its concepts of 'quality education' and 'inclusive education' led to different views of whether or not the 'policy' had already reached its goal. In one perception, it was understood that it was sufficient to provide all Roma children with places in non-segregated classes and encourage their school attendance, even though 'policy' ordinances went much further than this perception (Appendix 2). However, I propose that for the reasons given in the above paragraphs, barriers to education for Roma would not only still exist, but also could be exacerbated by classroom practices in a non-segregated school, as I observed that school practices appeared to be designed to suit the majority population rather than also including Roma children. Some 'policy' objectives, which partially relied on funding from sources outside the government, such as providing a Roma mediator, had not been met. Hence, I propose that in order for full implementation of the 'policy' and/or for successful future policies to be successful, measures need to be taken by the government to ensure that funding is available throughout the country

Finally, my research highlighted that there was a discontinuity in communication between different stakeholders: decision makers, county and local officials, teachers, Roma families and other stakeholders who were not involved in policy decision making. As a result, many tasked with implementation had little or no knowledge of the 'policy'. This worked against the effectiveness of its implementation, monitoring, evaluation and any consequent modifications.

## 8.2. Limitations of the study

A rationale for studying a single case is made when it is either representative or typical of other cases (Yin, 2009). My case study was not designed to be representative; however, in some respects, I did consider that it was typical of some other rural local districts in Romania and possibly elsewhere. The case study district, however, could not be considered typical of every rural district in Transylvania or elsewhere in Romania in terms of the education of Roma children or aspects which related to the success or otherwise of 'policy' implementation. It was limited because it focused on a district where segregation of schools and classes were no longer issues, and where there were few, if any, difficulties with being taught in a language that did not relate to the children's mother tongue. The case study also was unable to consider situations where more 'policy' strategies had been implemented, such as training all teachers in inclusive education, or the provision of a Roma mediator, or where the school had been given the advantages of other non-governmental funded projects to improve Roma education. However, I contend that it cannot be considered atypical because crucial issues have been raised in the previous section that are shared by many other school systems in Romania, whether or not all the stated strategies of the 'policy' had been implemented.

The study was also limited in time as well as locality because it reflected the situation that existed in one area between 2010 and 2012, rather than the possible present-day situation. Reports such as WB (2014) and EC (2016, 2019) do, however, suggest that the study may have as much relevance today as it did in 2012.

## 8.3. Recommendations for policy and practice

An important recommendation for policy makers and others involved in the various elements of a policy cycle regarding improving education for Roma, is that discontinuities in communication, as discussed in the previous chapter,

are addressed, and clear procedures drawn up to disseminate information, which should include the recognition that not all stakeholders may be literate. There not only needs to be top-down communication but also the views of practitioners and beneficiaries need to be heard and taken into consideration in making policy.

An example of the lack of communication given in my research findings was that only two out of twenty teachers knew about an existing course for teachers who taught Roma children, yet part of the 'policy' was that "all teachers were to be trained in inclusive education to provide a suitable multi-ethnic environment" (see Appendix 2). Both parents and teachers in particular appeared very willing to talk to me and discuss their views on the problems that Roma children faced in schools. Following the end of my field work, teachers and parents would continue to discuss relevant school issues with me and, on occasions, groups of Roma parents would stop me in the street to ask me to find out information for them from the school authorities, or else to let me know their concerns. I suggest that I was approached in this way partly because it appeared to them that no other avenues of communication about their concerns existed. Officials within the relevant organisations were frequently replaced during the life cycle of the 'policy' yet, there appeared to be no method of transferring information to relevant new recruits, nor a compulsion on heads of departments, such as school directors, to draw up a written strategy for their department regarding any policies to be given to all stakeholders.

Together with efficient dissemination of policy information, there is a need for a shared understanding of the meaning of a policy in order to help ensure that it does not fail (Spillane, 2004; Fullan, 2007). I propose that this needs to be done not only through informal discussions or by the written word, but also by regular in-service training sessions both within and between relevant organisations so that, for example, definitions of concepts that are open to different interpretations are clarified.

In its planning stage, there was a failure to consider the context of the 'policy' in relation to existing school practices and regulations (Colebatch, 2009). It is important, I consider, that the lack of such considerations at the time, which I referred to in my findings, be readdressed. I contend that there is an urgent need to consider how the priorities of delivering the school curriculum are balanced with the 'policy's' goal to improve the situation of Roma with respect to their education. For example, in their regular inspections of schools, the inspectorate should not only continue to focus on whether or not the curriculum requirements have been taught, but also should include the assessment of objective 'value added' measures, such as those described by Doherty (2008) and outlined in the indicators of inclusive education in ordinance 1540/2007 (MER 2007). In this way, a balance between teachers delivering curriculum requirements and all pupils making progress in their learning could be established. This would also need to be disseminated through in-service training within the inspectorate and schools, including all teachers, whether or not they are at present teaching Roma children. Such in-service training needs to include ways in which both administrators and teachers understand that the meaning of discrimination includes having stereotypical attitudes towards Roma and reflect on their own practices in this way.

## 8.3.1. Research into providing inclusive education for all children

Through my observations of junior-secondary teaching methods, I hypothesised that the traditional teaching methods of academic subject teachers discriminated against those children who had lower attainment scores in school assessments, by leading to their interacting more with pupils with the highest attainment. I proposed that in previous research this may have been misconstrued as discriminating against children because they were Roma regarding their school attainment. Research into whether the phenomenon I observed in the case study applied in other schools, with or without Roma students, could, I consider, be valuable. If the hypothesis is found to be statistically significant elsewhere, it could inform Romanian educational policy in general, and by

moving towards a more inclusive educational methodology it would not be of benefit many Roma children but all children with a lower level of attainment. It would also accord with Article 3p of the 2011 Education Act which refers to the principle of centring education on its beneficiaries (Indaco Systems, 2018), thus education must be centred on all school children and not only those most likely to succeed.

## 8.3.2. Roma mediators

A longitudinal study of the effects that Roma mediators have had in improving the parental/school interface, I propose, would be of benefit to the government and others, who may be encouraged to fund their training and employment. The WB policy recommendations reported that Roma school mediators had been trained by a PHARE project between 2003 and 2007, and that at the time of writing their report, 437 were currently employed in Romania (WB, 2014). Schools with existing Roma mediators could form part of the study, especially if they had been in continuous employment in one district, for example, over a ten-year period, especially if this research considered all relevant stakeholder such as parents, children and teachers.

Although my case study district did not have a Roma mediator, my findings showed that the lack of an effective parental/school interface was detrimental to the education of Roma children. The ten-year policy had as an objective, to provide Roma mediators, partly in order to facilitate such parent–school relationships. Therefore, I propose that research designed to measure whether or not Roma mediators had been effective in making improvements in this aspect of the 'policy' would be informative for making decisions about whether to extend their provision or, alternatively, investigate other measures to improve the situation, for Roma parents and children and the interface between them and teachers.

### 8.3.3. A policy of compulsory pre-school education

In the research study a lack of pre-school education was considered to be an important reason for Roma children not making as much progress in primary school (see chapters 5 and 6), therefore the policy to introduce this as compulsory is to be welcomed (Edupedu, 2019). However, prior to implement this policy, consideration needs to be given to the reasons why Roma children are not already attending kindergarten. In the schools involved in my study there were ample places for this free facility and teachers recognised lack of kindergarten was a major reason why Roma children did not make as much progress as their peers. However, reasons for not attendance were also put forward. These included not having sufficient clothes or the relatively long distance the young children would need to walk accompanied by their mother who may also be accompanied by even younger children or even babies. I consider that these could be exacerbated in the winter on dark cold mornings. The above difficulties together with problems of registering children for school, discussed in the previous chapter, I argue, means that these need to be addressed by policy makers and adequate measures taken such as the provision of transport or social payments prior to entering kindergarten where children needed to have adequate clothing. An official procedure for registering children which neither relies on the parents' ability to produce the correct documents nor the goodwill of teachers to spend the time and possibly funds to seeks out and help this process is also, in my view, an important consideration.

### 8.3.4. Roma history and culture in the school curriculum

Article 2011 3g of the 2011 Education Act together with the revisions made to it at the time of writing (Indaco Systems, 2018) referred to the principle of guaranteeing the cultural identity of all Romanian citizens and intercultural dialogue while Article 46 (10) stated that historical programs and textbooks will reflect the history and traditions of national minorities in Romania. Roma is a significant national minority and, while the history textbooks in the primary

school does list Roma as a national minority, unlike other minorities it does not expand on either the history or culture, rather simply encourages pupils to talk about their own culture. If all primary school teachers have not all received training in Roma culture and history such as may be provided by CDD (or equivalent), from INSETRom materials (INSETRom, 2010), or else, on their own initiative, read about the history of Roma from available materials such as that contained in Chapter 1 of this book, it is difficult to see how these conditions will be met. As stated above, in-service training is needed for all teachers in order to ensure inclusion. This means in practice that a comprehensive program of in-service training which includes Roma history and culture needs to be funded, together with time allocated, for all current teachers, while initial teacher training courses should also include such elements.

## Final conclusions

Although the fieldwork was completed in 2012, the EU and FRA reports (EC, 2026, 2019; FRA 2016) demonstrate that my findings which have given new insights into the education of Roma children in the context of Romania's policy are still very relevant to the current situation in Europe. The report (EC, 2016) assessed the implementation of the EU framework for national Roma integration strategies and also made further recommendations. It noted that "discrimination [against Roma] continues to be widespread across the EU" and that "no real improvements can be seen on the ground" (EC, 2016, p.8). With regard to education it recommended that, across the EU as well as in its report on Romania, "a pro-inclusive legal environment needs to be accompanied by effective implementation measures" (EC, 2016, p.10). I contend that my findings demonstrate that if education is only viewed in terms of having integrated schools without taking measures to ensure that, within such schools, all children receive inclusive education, as defined by the Dakar Framework for Action (UNESCO, 2000) policies will be unsuccessful. I also contend that they will also fall short of removing discriminatory stereotypical attitudes which adversely affect the education of Roma children.

The policy recommendations made in this chapter are by no means exhaustive and will also mean that the government must be committed to spend the time, effort and funds to ensure that these and other improvements are executed on the ground rather than only making legal statements of intent. This inevitably means putting more resources into education. However, in Romania, Article 8 of the 2011 Education Act (MER, 2011) states that 6% the gross national product (GDP) should be provided for education, yet the European Commission figures for 2015 (EC, 2017) showed that a little more than 3% was spent (the lowest percentage expenditure of any EU country). Provided that the condition of Article 8 of the Education Act is adhered to, I consider that this could help considerably with the extra provision needed for schools and their beneficiaries. Other countries will also need to consider the education budget necessary alongside plans to improve the education of Roma and other children. Only in this way schools may be enabled, not only take the step of providing integrated schools, but reduce stereotypical attitudes towards Roma and provide truly inclusive education for children, regardless of differences in ethnicity.

# APPENDICES

# APPENDIX 1.
# Estimates of Roma and country populations (CoE 2014)

| Country | Total Population | Minimum Roma Estimate | Maximum Roma Estimate | Average Roma Estimate | Avg. as % of Total Population |
|---|---|---|---|---|---|
| *"FYR of Macedonia"* | 2,060,563 | 134,000 | 260,000 | 197,000 | 9.56% |
| *Albania* | 3,204,284 | 80,000 | 150,000 | 115,000 | 3.59% |
| *Armenia* | 3,092,072 | 2,000 | 2,000 | 2,000 | 0.06% |
| *Austria* | 8,384,745 | 20,000 | 50,000 | 35,000 | 0.42% |
| *Azerbaijan* | 9,047,932 | 2,000 | 2,000 | 2,000 | 0.02% |
| *Belarus* | 9,490,500 | 25,000 | 70,000 | 47,500 | 0.50% |
| *Belgium* | 10,879,159 | 20,000 | 40,000 | 30,000 | 0.28% |
| *Bosnia & Herzegovina* | 3,760,149 | 40,000 | 76,000 | 58,000 | 1.54% |
| *Bulgaria* | 7,543,325 | 700,000 | 800,000 | 750,000 | 9.94% |
| *Croatia* | 4,424,161 | 30,000 | 40,000 | 35,000 | 0.79% |
| *Cyprus* | 1,103,647 | 1,000 | 1,500 | 1,250 | 0.11% |
| *Czech Republic* | 10,525,090 | 150,000 | 250,000 | 200,000 | 1.90% |
| *Denmark* | 5,544,139 | 1,000 | 4,000 | 2,500 | 0.05% |
| *Estonia* | 1,339,646 | 600 | 1,500 | 1,050 | 0.08% |
| *Finland* | 5,363,624 | 10,000 | 12,000 | 11,000 | 0.21% |
| *France* | 64,876,618 | 300,000 | 500,000 | 400,000 | 0.62% |
| *Georgia* | 4,452,800 | 1,500 | 2,500 | 2,000 | 0.04% |
| *Germany* | 81,702,329 | 70,000 | 140,000 | 105,000 | 0.13% |
| *Greece* | 11,319,048 | 50,000 | 300,000 | 175,000 | 1.55% |
| *Hungary* | 10,008,703 | 500,000 | 1,000,000 | 750,000 | 7.49% |
| *Ireland* | 4,481,430 | 32,000 | 43,000 | 37,500 | 0.84% |

| Country | Total Population | Minimum Roma Estimate | Maximum Roma Estimate | Average Roma Estimate | Avg. as % of Total Population |
|---|---|---|---|---|---|
| *Italy* | 60,483,521 | 120,000 | 180,000 | 150,000 | 0.25% |
| *Kosovo \** | 1,815,000 | 25,000 | 50,000 | 37,500 | 2.07% |
| *Latvia* | 2,242,916 | 9,000 | 16,000 | 12,500 | 0.56% |
| *Lithuania* | 3,320,656 | 2,000 | 4,000 | 3,000 | 0.09% |
| *Luxembourg* | 505,831 | 100 | 500 | 300 | 0.06% |
| *Montenegro* | 631,490 | 15,000 | 25,000 | 20,000 | 3.17% |
| *Norway* | 4,885,240 | 4,500 | 15,700 | 10,100 | 0.21% |
| *Poland* | 38,187,488 | 15,000 | 50,000 | 32,500 | 0.09% |
| *Portugal* | 10,642,841 | 34,000 | 70,000 | 52,000 | 0.49% |
| *Republic of Moldova* | 3,562,062 | 14,200 | 200,000 | 107,100 | 3.01% |
| *Romania* | 21,442,012 | 1,200,000 | 2,500,000 | 1,850,000 | 8.63% |
| *Russian Federation* | 141,750,000 | 450,000 | 1,200,000 | 825,000 | 0.58% |
| *Serbia (excl. Kosovo \** | 7,292,574 | 400,000 | 800,000 | 600,000 | 8.23% |
| *Slovak Republic* | 5,433,456 | 380,000 | 600,000 | 490,000 | 9.02% |
| *Slovenia* | 2,052,821 | 7,000 | 10,000 | 8,500 | 0.41% |
| *Spain* | 46,081,574 | 500,000 | 1,000,000 | 750,000 | 1.63% |
| *Sweden* | 9,379,116 | 35,000 | 65,000 | 50,000 | 0.53% |
| *Switzerland* | 7,825,243 | 25,000 | 35,000 | 30,000 | 0.38% |
| *the Netherlands* | 16,612,213 | 32,000 | 48,000 | 40,000 | 0.24% |
| *Turkey* | 72,752,325 | 500,000 | 5,000,000 | 2,750,000 | 3.78% |
| *Ukraine* | 45,870,700 | 120,000 | 400,000 | 260,000 | 0.57% |
| *United Kingdom* | 62,218,761 | 150,000 | 300,000 | 225,000 | 0.36% |

# APPENDIX 2.
# The 'policy' (2001–2011)

The 'policy' was initially included as a sector in the overall policy of:

## "Improving the condition of the Roma people in Romania"

## General considerations:

- The government adheres to UN conventions on racial discrimination and children's rights as well as other international agreements (this included signing the 'Education For All' (EFA) Dakar Framework for action in 2000)
- The fact that, in the course of history, Roma were an object of slavery and discrimination, phenomena that have left deep marks on the collective memory and which have led to the social limitation of the Roma
- The difficulties which the Romanian citizens that are Roma have to cope with, as well as the wish to identify optimal solutions for their resolution

## General objectives relevant to the educational policy:

- Removing stereotypes, prejudices and [their] practices
- Determining a positive change in public opinion concerning the Roma…
- Stimulating Roma participation in… [education]… based on involvement of [the MER] and community development projects.
- Preventing institutional and social discrimination
- Ensuring conditions for the Roma to have equal opportunities to attain a decent standard of life.        taken from MPI (2001, p.4)

*(All statements made in 2001 were published in English. 2004 and 2007 ordinances are my own translations from Romanian.)*

# The Policy of Equal Access
# to Quality Education for Roma Children

**MER policy statements relating to equal access to quality education for Roma children of primary and secondary school age (the 'policy').**

| | |
|---|---|
| **2004** | **Ordinance 29323/2004**<br>Ministry of Education aims as educational policy to ensure equity in education in terms of equal access to all forms, but also in terms of quality education for all children, regardless of ethnicity or language…In respect of this principle, improving the quality of education for Roma children is a priority. **(MER, 2004)** |
| **2007** | **Ordinance 1540/2007**<br>The county school inspectorates [and] pre-university education units throughout the country will promote as a priority the principles of the inclusive school. The inclusive school is a friendly and democratic school that harnesses cultural diversity in which all children are respected and included without discrimination or exclusion by ethnic origin, physical or mental deficiencies, cultural or socio-economic origins or native language.<br>Preventing and eliminating the phenomenon of school segregation is also a condition imperative to implement inclusive school principles. **(MER, 2007)** |

## Policy objectives

## 1. Encouraging school attendance and integrating schools

| | | |
|---|---|---|
| **2001** | MPI statement pp. 10–11 | Drafting out a program for encouraging school attendance and reducing dropout, particularly with the poor segments of the Roma population |
| | | Stimulating the access to education by offering a free lunch to all the pupils in primary and secondary schools. |
| **2004** | Ordinance | Forming mixed classes at all levels of education (responsibility of County Roma Inspector) |

| 2004 | | Implement a plan of appropriate measures to ensure that, within three years, the proportion of Roma children in classes and schools should reflect the proportion of Roma children of school age with the district |
| --- | --- | --- |
| | | Report difficulties in achieving integrated classes to MER |
| 2007 | Ordinance | The purpose of [integrating schools] is to prohibit segregation of Roma in classes and schools apart from exceptional cases when the class or school is taught in Roma language, or where the Roma community is too remote from an existing school other than one with only Roma pupils |
| | Inclusive Indicators | 13. Is the frequency of pupils monitored, taking into account ethnicity and gender? |
| | | 14. Are reasons for absences investigated and always checked? |
| | | 15. Is there a warning system and a set of procedures applicable to children who are about to leave school? |

## 2. Preventing Discrimination

| 2001 | MPI | Introducing themes for preventing and fighting discrimination within the general school programs. |
| --- | --- | --- |
| 2007 | Ordinance | Developing and implementing codes of conduct and applying disciplinary measures to regulate the acts of discrimination on the part of staff or students. School policy and procedures must be clear, consistent, consistently applied and provide both sanctions and a constructive approach. |
| *Note: integrating schools to prevent discrimination is included in previous section.* | | |

## 3. Teacher training

| 2001 | MPI statement | Improvement programs for teachers within the intercultural educational system |
|------|---------------|-------------------------------------------------------------------------------|
| 2004 | Ordinance | Training teachers in inclusive education to provide a suitable educational multi-ethnic environment; |
| 2007 | Ordinance | Teacher training in intercultural and inclusive education using non-discriminatory, differentiated and active-participatory teaching methods |
| | Indicators | 26. Have all teachers have been trained to work with groups of mixed students in terms of children's abilities? |
| | | 28. Have all teachers and the school mediator been trained how to deal with situations of intolerance if they are confronted with such situations? |
| | | 29. Have all teachers been trained about Roma history and culture? |

## 4. Extra help for pupils

| 2001 | MPI statement | Obligation of the school units and county school-inspectorates to organize permanent catch-up courses for Roma, throughout all the approved forms of education, upon individual or Roma organizations' request |
|------|---------------|-------------------------------------------------------------------------------|
| 2004 | Ordinance | Offering supplementary lessons for children who have difficulties in learning |
| 2007 | Ordinance | Provide extra recovery hours for the children if they are experiencing difficulties in learning; school units will provide afternoon school programmes for students who need school recuperation, for example, as a result of being educated in high quality educational environments |

## 5. Teaching and promoting Roma ethnic identity

| **2004** | Ordinance | Promotion of the Roma ethnic identity in mixed schools, including in the curriculum; |
|---|---|---|
| **2007** | Ordinance | h) Periodic review of the curriculum materials. |
| | | i) Providing an intercultural curriculum that encourages students to reflect and to critically analyse how prejudice and discrimination work. |
| | | j) Promoting the ethnic identity of Roma in mixed schools, including through curriculum. |
| | Indicators | 37. Do curriculum materials / school resources provide positive images of all ethnicities, including Roma, and contain accurate information on their history and culture? |
| | | 44. Do teachers and students know the culture and lifestyle of local ethnic communities? Are these respected and celebrated in the school? |

## 6. PARENTAL and community involvement in schools

| **2001** | MPI statement | Create and implement programs to encourage Roma parents to participate in school and extra-curricular educational process. |
|---|---|---|
| **2004** | Ordinance | Inform all parents about the benefits of inclusive education to discourage those who ask for the inclusion of their children in classes without Roma students or the organisation of separate classes for Roma. <br> Inform Roma about the quality of education in mixed schools through regular visits involving Roma parents in school decisions. |
| **2007** | Ordinance | Inform local communities about the quality of education in mixed schools and the involvement of all parents, Roma and non-Roma, in the school's decisions. |

| 2007 | Indicators | 2. Is the representation of children and parents from disadvantaged groups in consultative structures such as: parents 'and students' councils actively promoted and encouraged? |
|------|-----------|------|
| | | 41. Are there visible signs and materials on the entrance to school, written in the appropriate languages, welcoming all visitors, regardless of the ethnic group they come from? |
| | | 45. Are opinion polls conducted annually to find out whether pupils and parents of disadvantaged pupils feel respected and appreciated by school staff? |
| | | 46. Do staff and mediators relate to parents through face-to-face meetings and/or letters written in an accessible manner? Can the progress made by pupils be given verbally or in writing, as needed? |
| | | 47. Is school information easily accessible to pupils/parents and is presented in an easy-to-understand form? |
| | | 48. Do parents and students have formal and informal opportunities to discuss with the school director and teachers certain issues that concern them? |
| | | 50. Are there different channels through which students and parents can confidentially communicate their problems? |
| | | 51. Do all parents know that school has a legal obligation to provide an environment in which all children learn together? |
| | | 56. Is the school leadership prepared to take a leading role in defending children's rights and have a proactive response if discriminatory incidents take place outside the school? |

## 7. Training and employment of school mediators

| 2001 | MPI statement | Implementing programs for school mediators' training |
|------|--------------|------|
| 2004 | Ordinance | Training and employing Roma school mediators |

| 2007 | Ordinance | Training and employment of school counsellors and Roma school mediators |
|---|---|---|
| | Indicators | 6. Does the school mediator and the teaching staff work with their families to encourage early enrolment at school? |
| | | 7. Does the school mediator inform the school about the cases of school enrolment delay? |

## 8. Classroom teaching: indicators for inclusive schools

| 2007 | Indicators | 4. In classrooms with a linear arrangement, is the student's layout is changed regularly so that no group of children is always at the back of the classroom? |
|---|---|---|
| | | 5. Do teaching-learning activities include work in groups where children from disadvantaged groups and other children work together? |
| | | 19. Do teachers follow the pupil's individual progress and compare the projected performance with the actual performance? |
| | | 20. Are action plans being developed that include targets established with reference to the intervention areas identified by the student's outcomes analysis? |
| | | 22. Are the results of the evaluation analysed to allow for a comparison between the individual progress of pupils in disadvantaged groups and the average rate of progress? |
| | | 23. Is the school evolution of pupils in disadvantaged groups analysed in order to establish long-term progress? |
| | | 24. Are remedial education programs available to students who need it? |

# APPENDIX 3.
# Quantitative observations method for interactions and example seating plans

## Quantitative observations:

The INTERSECT observation method was originally designed to record the distribution and nature of teacher comments to students which also identified the race and gender of each student. This method included distinguishing between evaluative comments relating to a student's work and comments relating to a student's behaviour. From my pilot study of lessons where I compared differences in teachers' comments relating to gender, rather than whether a child was Roma or non-Roma, I noted that teachers' negative comments were all behaviour-related: either a child had not done sufficient work, was inattentive or else disruptive. I referred to this collated category as 'negative teacher comments'. During data collection, I discovered that the totals of negative comments were comparatively few and therefore not statistically significant in terms of comparing the difference between Roma and non-Roma children.

I used the symbols +, = and – representing a positive, neutral or negative teacher interaction with a pupil, together with the seat number assigned by me for each pupil for the specific lesson observed. I wrote this down in sequence, in a column, as it occurred during the lesson, e.g. 7+, 3=, 10=, 1– etc. This enabled me to identify whether or not a child was Roma and also add comments alongside. The results were collated on an EXCEL spreadsheet, for each lesson, in preparation for quantitative analysis, as shown in the example on the following page:

## School A primary section lessons

| Non-Roma | | | Roma | | | Both | | | No. N | No. R |
|---|---|---|---|---|---|---|---|---|---|---|
| +ve | = | –ve | +ve | = | –ve | +ve | = | –ve | | |
| 7 | 60 | 4 | 2 | 14 | 0 | 9 | 74 | 4 | 6 | 4 |
| 1 | 26 | 11 | 1 | 19 | 2 | 2 | 45 | 13 | 6 | 4 |
| 2 | 18 | 5 | 5 | 16 | 2 | 7 | 34 | 7 | 6 | 4 |
| 8 | 8 | 1 | 3 | 23 | 0 | 11 | 31 | 1 | 5 | 6 |
| 6 | 32 | 1 | 5 | 24 | 5 | 11 | 56 | 6 | 5 | 6 |
| 4 | 36 | 0 | 6 | 36 | 2 | 10 | 72 | 2 | 5 | 6 |
| 6 | 36 | 1 | 1 | 30 | 0 | 7 | 66 | 1 | 5 | 5 |
| 5 | 38 | 3 | 4 | 28 | 2 | 9 | 66 | 5 | 5 | 5 |
| 4 | 21 | 5 | 5 | 40 | 9 | 9 | 61 | 14 | 5 | 5 |
| 0 | 12 | 6 | 0 | 9 | 6 | 0 | 21 | 12 | 5 | 5 |
| 2 | 42 | 0 | 3 | 27 | 4 | 5 | 69 | 4 | 6 | 5 |
| 4 | 32 | 6 | 5 | 34 | 3 | 9 | 66 | 9 | 6 | 5 |
| 1 | 21 | 10 | 10 | 18 | 4 | 11 | 39 | 14 | 6 | 5 |
| 0 | 22 | 2 | 1 | 4 | 8 | 1 | 26 | 10 | 6 | 5 |
| 1 | 3 | 0 | 2 | 10 | 0 | 3 | 13 | 0 | 3 | 5 |
| 51 | 407 | 55 | 53 | 332 | 47 | 104 | 739 | 102 | 80 | 75 |

## Example: Class seating plans in junior-secondary school

Dark grey = Roma child and light grey = empty seat or space

| Back of classroom | | | | | |
|---|---|---|---|---|---|
| [light grey] | me | [light grey] | 21 | 8 | 7 |
| 20 [dark] | 19 | 14 | 13 | 6 | 5 |
| 18 [light] | 17 [dark] | 12 | 11 [dark] | 4 | 3 |
| 16 | 15 | 10 [dark] | 9 [dark] | 2 | 1 |
| Front of classroom (Class 5) | | | | | |

| Back of classroom | | | | | |
|---|---|---|---|---|---|
| [light grey] | me | [light grey] | 25 [dark] | | |
| 24 | 23 | 16 [dark] | 15 [light] | 8 [light] | 7 |
| 22 [light] | 21 [dark] | 14 [dark] | 13 [dark] | 6 | 5 |
| 20 | 19 [dark] | 12 | 11 [dark] | 4 | 3 |
| 18 | 17 | 10 | 9 | 2 | 1 |
| Front of classroom (Class 6) | | | | | |

# APPENDIX 4.
# Quantitative results for Absences

***Differences in frequency of absences between Roma and non-Roma children in School A primary and junior secondary departments recorded over one year:***

Given the small number of children analysed and that the data were not normally distributed, the Mann-Whitney U two-tailed test was used to ascertain whether the difference in the frequency of absences between the groups was statistically significant:

H$_0$: There is no difference in the frequency of absences between Roma and non-Roma pupils

H$_1$: There is a difference in the frequency of absences between Roma and non-Roma pupils

**Primary department**: the null hypothesis (H$_0$) was rejected in favour of the alternative hypothesis at the 2% level of significance. Absences appeared to be uniformly distributed throughout the school year.

**Junior-secondary department:** the null hypothesis (H$_0$) was also rejected in favour of the alternative hypothesis; in this case the level of significance was 5%.

However, in repeating the Mann Whitney U test for significance for the first semester only, H$_0$ was accepted, which meant that although over the whole year there was a statistically significant difference in absences between Roma and non-Roma pupils, this was confined to the second semester.

## Absences caused by wet weather in Primary School A

| | Data for Roma children | | | | | Data for Non-Roma children | | |
|---|---|---|---|---|---|---|---|---|
| | wet | dry | | | | not wet | wet | total |
| observed | 234 | 919 | 1153 | | observed | 86 | 18 | 104 |
| expected | 165 | 988 | 1153 | | expected | 85 | 19 | |
| | Fisher's two tailed test p=0.0002 extremely significant (using integer values) | | | | | Fisher's two tailed test p=1 | | |

## Differences in absences between three children from the same family

Differences in absences between September and December for three children in the same family where initially the parent (PL) told me that her children were only absent when they did not have enough food; but later explained that one child was more sensitive and was ashamed that (s)he could not bring in extra food to school like other children in her/his class (see p.197):

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 0 | 0 | 1 | 1 | 0 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 1 |
| 1 | 0 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 1 | 0 | 1 | 1 | 0 | 1 | 1 | 0 | 1 | 0 | 1 | 0 | 1 | 0 | 0 | 1 | 0 | 1 | 0 | 0 |
| 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 0 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 |

Total

| | | | | | | | | | | | | | | | | | | | | | | | | | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 1 | 0 | 43 |
| 1 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 1 | 1 | 1 | 32 |
| 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 1 | 0 | 1 | 1 | 1 | 1 | 1 | 0 | 1 | 1 | 0 | 1 | 1 | 45 |

Key:  1 – indicates present;   0 – indicates absent (*total gives the number of days present*)

# APPENDIX 5.
# Thematic Analysis: codes and themes

## Themes and codes for chapter 5 Perceptions of Policy

The major theme 'perceptions of policy' was subdivided into 5 sub-themes in order to answer sub-question 1:

***1. What are the stated perceptions of the county school inspectorate, local council administrators, teachers and parents of the policy to achieve equal access to quality education for Roma?***

1. related to attending schools

2. related to teaching Roma children

3. uncertainty about the policy

4. not knowing about aspects of the policy

5. additional measures needed

## Themes and codes for Chapter 6 Practices

The major theme 'practices and their effects within the schools' was divided into 2 sub-themes in order to answer sub-question 2:

***2. What are the current practices in the case study area that affect the realisation of the 'policy', regarding the education of Roma children?***

1. Engagement in 'classroom' activities

2. Connections between home and school

Second major theme: More important than attending school

## Codes for each theme:

## Chapter 5

| 1. Related to attending schools | 2. Related to teaching Roma children | 3. Uncertainty about the policy |
|---|---|---|
| abandoning school | discrimination | civilising Roma |
| discrimination | funding | civilising Roma |
| encourage attendance | equal opportunity | democracy |
| encourage enrolment | giving extra help | do not understand it |
| integration | inclusion | EU |
| providing a snack | integration | insufficient information |
| Roma mediator | no discrimination | not heard anything formal |
| same school as non-Roma | school projects | sceptical about government intentions |
| scholarships | 'second chance' project | |
| 'second chance' project | teacher training | |
| teachers responsible | teaching methods | |
| | treating in the same way | |
| **4. Not knowing about aspects of the policy** | **5. Additional measures needed** | |
| changing teaching methods | behaviour | |
| county plan | educating parents | |
| discrimination | more funding | |

| 4. Not knowing about aspects of the policy | 5. Additional measures needed | |
|---|---|---|
| *important* | *more resources* | |
| *inclusive education* | *poverty* | |
| *integrated schools* | *social skills* | |
| *involving Roma parents* | *social support* | |
| *more help in school* | | |
| *not heard anything* | | |
| *teacher training* | | |

## Chapter 6

| Engagement in 'classroom' activities | Connecting school and home | More important than attending school |
|---|---|---|
| *ability (difference of)* | *feeling offended* | *abandoning school* |
| *absences* | *dissatisfaction* | *bad weather* |
| *assessments* | *enrolling children* | *being away from home* |
| *being lazy* | *heard nothing* | *being bullied* |
| *catching up work* | *not informed* | *distance from school* |
| *class seating* | *not possible* | *early marriage* |
| *curriculum* | *parents uninterested* | *feeling ashamed* |
| *different work* | *parents visiting school* | *feeling embarrassed* |
| *disadvantaged* | *satisfaction* | *health* |
| *discrimination* | *school contacting home* | *helping family* |
| *disregarding school regulations* | *school meetings* | *hungry – insufficient food* |

| Engagement in 'classroom' activities | Connecting school and home | More important than attending school |
|---|---|---|
| *given same work* | *teachers uninterested* | *lack of interest in school* |
| *graduating class* | *teachers visiting home* | *learning difficulties* |
| *homework* | | *poverty* |
| *inclusion* | | *receiving the money* |
| *inspections* | | *school boring* |
| *interactions* | | *school regulations* |
| *need more help* | | *shoes and clothes* |
| *no time* | | *too old* |
| *pupil-teacher relations* | | *too tired* |
| *Roma culture* | | *working children* |
| *seating* | | |
| *segregated* | | |
| *teacher interactions* | | |
| *textbooks* | | |
| *time spent working* | | |
| *unprepared for school* | | |
| *want more work* | | |

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"Between the definition of a national or European program and its resulting activities the path sometimes leads to dead ends or takes on unforeseen directions that can be in contradiction with the expected goals."
**Jean-Pierre Liegeois**, *2007, Roma education and public policy. European Education, 39 (1)*

This book looks in depth at the situation of Roma education in Europe, starting with considering the origins of the estimated 10 – 12 million Roma who live throughout Europe and the difficulties they have encountered in being an ethnic minority. It then focuses in depth on a small administrative region in Transylvania over a period of two years, exploring how the Romanian Governments policy was implemented. It includes detailed evidence gained from parents, children, teachers and administrators as well as from classroom observations. The study helps all those interested in the education of marginalised groups, such as Roma, understand how educational inclusion is not always reached despite good intentions; as well as how it might be achieved.

*

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