

SOCIAL INCLUSION BETWEEN NEEDS AND OPPORTUNITIES

Habilitation Thesis

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Abstract

The field of social policies, the component of social inclusion particularly, is a constant research topic in the international and national research. The research directions presented in the habilitation thesis belong to the specific areas of social policies: social inclusion, Roma population, programs and program evaluation, absorption of the European Social Funds, social economy for the vulnerable groups.

The contributions mentioned in the paper refer mostly to the last 6-7 research years. These contributions support the experience accumulated in 16 years of research.

The papers on social inclusion that are presented approached both the theoretical component regarding the international and national concepts, as well as the applied component, by showing the relevant policies from Romania.

As member of research team in some of the most representative research projects and evaluations focused of the Roma population living in Central and South-Eastern Europe, particularly in Romania my contribution is significant both in terms of knowledge in this field, and in terms of policy development (Zamfir, Zamfir 1993; Ivanov, 2002; Preda, Zamfir, 2002; Cace, Vladescu, 2004; Cace et al., 2007; Cace et al., 2010).

Part of the explanations regarding the behavioural differences between the Roma and non-Roma population have roots in cultural patterns. The Roma are thought to behave suboptimal because of their cultural legacy, and the culture has a large inertia, preventing the people to adapt to new conditions. By contrast, economists start from the idea that people behave optimally in an individual manner, by adapting rapidly. Actually, each of the two approaches contributes more or less to explaining the process of excluding the Roma population from the social life with all its components.

The paper that overview developments in the field of public policies for Roma people (Ionescu, Cace, 2006) is the continuation of a program initiated by the Research Institute for Quality of Life, by presenting and studying the public policies impacting on the Roma population.

The paper *Employment policies for the Roma population* (Ionescu, Cace, 2006), brings information on the employment status and on the access of the Roma to the labour market.

One of the research hypotheses launched by the authors (Cace, 2007), is that low level of stimulation of the financial earning because of a system of mutual assistance (solidarity networks) which is a characteristic of these communities. The economic exclusion, obvious by the lack of constant, safe incomes, produced necessarily the need to develop a system for the redistribution of the material values within the community. However, the asymmetry of the access to income leads to the situation in which some people rather help the others while not benefiting of reciprocity.

Another area of interest is the absorption of the European funds, the social programs and their evaluation (Cace, Duminičă, Preda, 2006; Arpinte, Cace, Preotesei, Tomescu, 2009; Cace, Cace, Iova, Nicolăescu, 2009, Cace, Cace, Nicolăescu, 2011).

Within the context of the global economic recession, the new EU member states should commit themselves to constant efforts in order to optimise their national capacities to absorb allocated European Funds during the pre-accession period, more to maintain the level, rather than to reduce the gap from the EU member states.

Thus, the evaluation of the absorption capacity becomes imperative for the efficientization of the process of planning, development and implementation of the projects/programs financed by the EU following the transfer of positive community practices between the old and new EU member states, for the use of all available resources and for avoiding the "saturation point" in funds absorption.

The evaluation of the social programs is presented in papers approaching national programs and specific programs from various areas.

The social economy provides an innovatory solution to alleviate social exclusion by increasing the labour insertion especially in the case of vulnerable people by developing support mechanisms (Arpinte, Cace, Cojocaru, 2010). Within the context in which the EU stresses the implementation of Europe 2020 strategy, which is associated to the definition of the social economy as a serious partner of the civil society and of the state, it is important to monitor and evaluate the initiatives running in this field of activity and to present the mechanisms which establish a healthy and vibrating ecosystem through this form of economy which supports the innovating social entrepreneurs (Cace, Arpinte, Cace, Cojocaru, 2011). Thus, social economy evaluation and monitoring is a challenge both for the beneficiaries and for the structures involved in running projects in this field. A key element is to strengthen the proactive modalities of incorporating the experiences which prove that social economy can actually contribute to the social cohesion and that it may be one of the significant actors struggling against social exclusion (Cace, Nicolaescu, Scoican, 2010).

Other researches approached occupational policies, the street children, the working Roma children, child trafficking, process, impact and ex-post evaluation of social programs, development of the civil society, the health state of the Roma population and the access to social services, identification of positive practices.

The surveys to which I participated used several research methods such as quantitative studies on nationally, regionally and locally representative samples, document analysis, secondary data analysis, quasi-experimental analysis, cost-benefit analysis, ex-post and impact analysis, case studies using quantitative and qualitative data.

In the coming period, I will continue to develop in-depth research on the role of social economy for the provision of social welfare, particularly at the local level, highlighting the involvement of the actors interested in local development. I also intend to expand the research on the vulnerable groups and on social inclusion. Within this context, a priority objective is to publish papers on the Roma population, both in Romanian and in foreign journals

In my research work plan for 2012 and 2013 I intend to conduct research using multi- and inter-disciplinary teams, approaching various subjects at edge cut between vulnerability, provision of social services and health. A special attention is paid to involvement of young researchers specialised in different areas.

Beyond the individual effort for research and dissemination of the research results, part of my papers relies on collective work, which is why I want to thank the leadership of the Research Institute for Quality of Life and all my colleagues from the institute and to all the other people with whom I worked during the 16 years of research activity.

Rezumat

Domeniul politicilor sociale și, în special, componenta de incluziune socială, reprezintă o preocupare constantă a cercetărilor la nivel internațional și național. Direcțiile de cercetare prezentate în teza de abilitare se încadrează în sfera politicilor sociale: incluziune socială, populația roma, programe și evaluare de programe și economie socială pentru grupuri vulnerabile.

Contribuțiile care vor fi menționate în lucrare se referă cu precădere la perioada din ultimii 6-7 ani. Aceste contribuții confirmă experiența acumulată în 16 ani de cercetare.

Lucrările privind incluziunea socială prezentate vizează atât componenta teoretică cu referire la concepte în plan internațional și național cât și componenta aplicată prezentând politicile în domeniu în România.

Participant la o parte din cele mai importante cercetări și evaluări privind populația roma din România și Europa Centrală și de Est contribuția mea este importantă atât, din perspectiva cunoașterii domeniului, cât și, din punct de vedere al politicilor dezvoltate. (Zamfir, Zamfir, 1993; Ivanov, 2002; Preda, Zamfir, 2002; Cace, Vlădescu, 2004; Cace și alții, 2007; Cace și alții, 2010).

O parte din explicațiile cu privire la diferențele comportamentale dintre romi și nonromi pornesc de la modelele culturale. Se consideră că romii se comportă suboptimal din cauza moștenirii lor culturale, iar cultura are o mare inerție, împiedicând indivizii să se adapteze unor noi condiții. Prin contrast, economiștii pleacă de la ideea că oamenii se comportă optimal în mod individual, adaptându-se rapid. De fapt, fiecare din cele două abordări contribuie într-o mai mare sau mai mică măsură la explicarea procesului de excluziune a romilor din viața socială cu toate componentele ei.

Lucrarea care prezintă politicile publice pentru romi (Ionescu, Cace, 2006) este o continuare a unui program inițiat de către Institutul de Cercetare a Calității Vieții, prin prezentarea și studierea politicilor publice cu impact asupra populației roma.

Lucrarea Politici de ocupare pentru romi (Ionescu, Cace, 2006) aduce informații privind situația ocupațională și accesul la piața muncii a romilor.

Una din ipotezele lansată de autori (Cace, 2007) se referă la nivelul scăzut de stimulare a câștigului financiar din cauza unui sistem de întraajutorare (rețele de solidaritate) caracteristic acestor comunități. Marginalizarea economică evidențiată prin lipsa veniturilor constante și sigure a produs cu necesitate nevoia creării unui sistem de redistribuire a valorilor materiale în comunitate, însă asimetriile privind accesul la venit duc la situația în care unii ajută mai mult fără a beneficia de reciprocitate.

O altă zonă de preocupări este reprezentată de absorbția fondurilor europene, programele sociale și evaluarea lor. (Cace, Duminică, Preda, 2006; Arpinte, Cace, Preotesei, Tomescu, 2009; Cace, Cace, Iova, Nicolăescu, 2009; Cace, Cace, Nicolăescu, 2011).

În contextul recesiunii economice globale, noile țări membre UE ar trebui să realizeze eforturi constante de optimizare a capacității de absorbție a fondurilor europene în perioada de pre-aderare mai ales pentru menținerea nivelului, decât pentru reducerea discrepanțelor între statele membre UE. Astfel, evaluarea capacității de absorbție devine imperativă pentru eficientizarea procesului de planificare, generare și implementare a programelor/ proiectelor finanțate de către UE ca urmare a transferului de practici comunitare pozitive între statele membre mai vechi și cele noi, utilizarea tuturor resurselor disponibile, precum și pentru evitarea instalării fenomenului „punctul de saturație” în absorbția fondurilor.

Evaluarea programelor sociale este prezentată prin lucrări care abordează programe naționale și programe specifice în diferite domenii.

Economia socială oferă soluții pentru a se reduce excluziunea socială prin creșterea ratei de ocupare a persoanelor vulnerabile și prin crearea mecanismelor de suport (Arpinte, Cace, Cojocaru, 2010). În contextul în care se pune un accent major pentru transpunerea în practică a Strategiei Uniunii Europene 2020, ceea ce se asociază cu definirea economiei sociale ca un partener serios al societății civile și al statului este importantă monitorizarea și evaluarea inițiativelor derulate în acest sector și prezentarea mecanismelor prin care se creează un ecosistem sănătos și vibrant prin această formă de economie ce sprijină antreprenorii sociali inovatori (Cace, Arpinte, Cace, Cojocaru, 2011). Astfel, evaluarea și monitorizarea economiei sociale reprezintă o provocare atât pentru beneficiari cât și pentru structurile implicate în derularea proiectelor în acest domeniu. Un element important este accentuarea modalităților proactive de a încorpora experiențele care dovedesc că economia socială poate contribui în mod efectiv la coeziunea socială și poate fi unul dintre principalii actorii care luptă împotriva excluziunii sociale (Cace, Nicolăescu, Scoican, 2010).

Alte cercetări au avut în vedere: politici de ocupare, copii străzii, munca la copii romi, traficul de copii, evaluări de proces, de impact și expost privind programele sociale, dezvoltarea societății civile, starea de sănătate a populației roma și accesul la serviciile sociale, identificarea de practici pozitive.

Metodele de cercetare utilizate în cercetările la care am participat sunt diverse și includ studii cantitative pe eșantioane reprezentative la nivel național, regional și local, analiza de documente, analiză secundară de date, analize cvasiexperimentale, analize cost beneficiu, analize expost și de impact, studii de caz prin utilizare de date cantitative și calitative.

În viitor voi continua să dezvolt cercetări aprofundate privind rolul economiei sociale în furnizarea bunăstării sociale, cu precădere la nivel local accentuând implicarea actorilor interesați de dezvoltare locală. De asemenea, am în vedere extinderea cercetărilor referitoare la grupurile vulnerabile și incluziune socială. În acest context, valorificarea experienței privind situația populație roma prin publicarea unor articole în reviste de specialitate din țară și din străinătate este un obiectiv prioritar.

Doresc să realizez cercetări în echipe multi și interdisciplinare care să studieze problematica de graniță între vulnerabilitate, servicii sociale și de sănătatea și care să implice cercetători tineri din domenii diverse.

Dincolo de efortul individual pentru cercetare și diseminare a rezultatelor cercetărilor o mare parte din lucrările mele au la bază o muncă colectivă. De aceea, mulțumesc reprezentanților conducerii Institutului de Cercetare a Calității Vieții și tuturor colegilor mei din institut și din afara lui alături de care am lucrat în cei 16 ani de cercetare.

Introduction

1.1. SCIENTIFIC CONTEXT

Over the recent years, the approach of the vulnerable or disadvantaged groups in the field of social policies from Romania and Europe has been expanded with the terms of social exclusion and inclusion. During the past decade, such social problems had been rather included in the subject field of poverty or human development.

Theoretically, there is a wide range of viewpoints on the term of social exclusion. They vary from contesting this term as too vague or even recessive, to highlighting a positive role of multidimensional analysis and understanding of some aspects of the quality of life which do not pertain solely to material, income aspects. Social inclusion, however, is not confronted with significant problems of definition, being perceived mainly as response of social policies at the level to the situations of social exclusion.

At the European level, the term of social exclusion was formulated in the late 1980 years and in the early 1990 years, during the mandates of the Delors Commission. The community institutions (Council, Commission) initiated in 1975 several programs approaching poverty. The third program which run between 1989-1994, known informally as *Poverty III*, financed the establishment of the *Observatory of the national policies to control social exclusion*. In the early 1990 years, social exclusion and inclusion were mainstreamed within all the EU policies, starting with the Maastricht Treaty and its annex protocols, with the reform of the European Social Fund objectives, in the documents of the European Parliament and in the Programs of Social Action of the European Commission (Estivil, 2003).

Some authors considered that one of the reasons why social exclusion has been adopted so quickly within the European institutional level was the refusal of the conservatory governments at that time, the Thatcher government in the United Kingdom (Berghman, 1995, Nolan, 1996) and the Kohl government on Germany (Hills, 2002), to acknowledge the existence of poverty, preferring the term of social exclusion which was perceived rather vaguely. On the other hand, EU itself preferred to use the term of social exclusion because it relates to the need to accompany the economic integration with measures promoting social integration, while not implying the possibility that the economic integration causes poverty for some vulnerable groups or areas (Nolan, 1996).

Social inclusion is a rather recent term. Unlike exclusion, no reference term, such as R. Lenoir's book of 1974, originating particularly from the institutional environment. In the early 1990 years, political documents of the community institutions such as the *Green Chart on European Social Policies: Options for Union* from 1993, mention the control of social exclusion as public policy line. Inclusion was not yet present in the academic environment of those years, the analysis of the policies controlling social exclusion using terms such as integration or insertion (Rodgers, 1995). The moment of reference for the introduction of the term of social inclusion was the Lisbon Council of Europe from 2000, which also launched a strategy of the European Union with 2010 as horizon, known as the Lisbon Process or Strategy.

Exclusion is an older term, which appeared initially in the 1970 years and used initially in France in the early 1980 years as concept of social policies and subsequently, during the next decade, throughout the European Union.

Social exclusion is a term which entered the current language of the social policies, both at the institutional level, and in their study, at the academic level. However, one cannot speak of consensus on the exact meaning or on the precise definition of the term. Tony Atkinson was showing that this is the very reason why the term become so widespread (Atkinson, 1998). We will present subsequently some of the most important dimensions in the definition of the social exclusion and in the classification of definitions, as proposed by David Byrne.

Gerry Rodgers identified two categories or patterns of social exclusion present in the different definitions, whose use depended on the regional specificity, on the continent where the definition was developed. The first five categories represent exclusion from: (1) goods and services; (2) labour market; (3) land property; (4) security (physical or regarding the contingencies), and (5) human rights. The sixth category has a rather vague formulation, (6) relation between exclusion and the strategies of economic-social development, which actually referred to the social costs of the programs of structural adjustment (Rodgers, 1995). Estivil (2003) proposed a much simpler classification, in three dimensions: (1) politic; (2) social; (3) economic.

Tony Atkinson (1998) noticed three essential aspects in the multiple definitions of the exclusion: (1) relativity; (2) act of exclusion and (3) dynamics.

(1) Relativity refers to the particular conditions of time and space of exclusion, to the specificity of the social groups from the physical space of reference of the definition. Therefore, the groups affected by exclusion are not the same in Latin America and northern Europe.

(2) The act of exclusion regards the incapacity of the individual to exceed by own force the situation of exclusion. For instance, there is a difference between the option of not activating on the labour market and the incapacity to get a job, irrespective of the will of the individual. (3) The dynamics of social exclusion regards the future prospects of the people, with the possibility to extend over to the next generation.

David Bryne (1999) proposed the classification of the social exclusion definitions in two categories: “soft” and “hard”. The criteria operated in this classification are somehow in continuation of the debate regarding the progressive or regressive potential of the social exclusion. For Byrne, the specific difference consists in showing the importance of the material and power inequalities. Thus, one may distinguish between the real assumption of the social inclusion and a fake assumption behind vague considerations.

An example of “soft” definition is the one formulated by the researchers of the Centre for Analysis on Social Exclusion (CASE) of the London School of Economics. According to this definition, “an individual is socially excluded if (a) he/she is geographically resident in a society, but (b) for reasons beyond his/her control, he/she cannot participate in the normal activities of an ordinary citizen from that society and (c) he/she would like to participate” (Burchardt, 1999: 226).

A “hard” definition was proposed by Jordi Estivil. Thus, social exclusion “can be understood as an accumulation of confluent processes with successive breaks from the core of the economy, political life and society, which distance gradually and which puts people, groups, communities and territories in a position of inferiority in relation with the predominant centres of power, resources and values” (Estivil, 2003:19).

Haralambos and Holborn conclude on the variety of definitions of the social exclusion that “they tend to reflect the theoretical and political preferences” (2008: 228) of the people issuing such definitions. However, this should not decrease the useful role of social exclusion in broadening the debates on social issues.

In the Romanian academic environment, the definition proposed by the *Dictionary of social policies* is also found under a slightly expended form in the topic article from the *Encyclopaedia of Social Development*. According to the authors, social exclusion “refers mainly to a situation of failure regarding the full accomplishment of the citizen rights, both due to socio-economic structural causes, and to individual causes” (Zamfir, Preda, Dan, 2007: 241). This definition has a two-fold ascendancy: (a) all four dimensions of the social integration (civic, economic, social and interpersonal), according to the report of the EU *Poverty III* program from the early 1990 years and (b) T. H. Marshall’s concept of citizenship from 1950 (Preda, 2002). According to David Bryne’s criteria for the classification of social exclusion definition, this definition would be rather a “soft” one.

Inclusion is a much more recent term, being defined as the *policy of response to the situations of social exclusion* from the documents of the 2000 Council of Europe, among which the Lisbon Strategy. In the following years, the *promotion of social inclusion* as line of public policy replaced the *control of social exclusion*.

Two questions regarding social inclusion arise from the academic environment: (1) how much inclusion can be more than just an active response to the situations of exclusion and (2) how much can we speak of an impact of social inclusion on the structure of the social programs. However, both aspects, as well as the approach of social inclusion - concept in the social policies, are very rarely and only marginally present in the academic analyses.

Regarding the first question, the theoretical position by which inclusion is seen more than a reaction to the social exclusion is properly represented by Meg Luxton (2002). According to the author, social inclusion “admits that the solution to inequality is not to merely offer the same formal rights to the excluded people (...). Rather, than expecting the conformation of the marginal people with the prevailing norms and practices of the people from the centre, social inclusion implies the reconfiguration of the centre in order to include the practices of the marginal people too” (Luxton, 2002: 2–3). In other words, this position highlights the potential to integrate the different minority cultural groups.

A clear response is yet to be formulated to the second question. In his analysis of the impact of UK social programs structure on inclusion, John Hills concludes that “the way of thinking the policies and responses to problems as poverty, deprivation and disadvantage *can* change”, but “whether this *actually* happens in reality is another question” (Hills, 2002: 240). As arguments, Hills mentioned the analyses of the Social Exclusion Unit working under the British Prime Minister, which focused on other mattress too besides the material poverty, such as: school dropout, deprivation, homeless people and teenage pregnancy. However, Hill noticed a close connection between inclusion and the rhetoric of employment in the social policies promoted by the *New Labour* government led by Tony Blair.

1.2. DIRECTIONS OF RESEARCH

Most of my activity focused on the way in which the social policies are developed and implemented, with the purpose to identify solutions to improve the social inclusion of the vulnerable groups.

The reason behind my research was the in-depth knowledge of the underlying mechanisms of social inclusion and the development of interventions in support of increasing the access of the vulnerable groups to social life.

In general terms, I initiated and participated in several research activities related to the knowledge of the social policies, to the definition of the associated concepts, to the development of adequate methodologies and to sketch adequate methodologies for social inclusion.

This activity produced several results in terms of social inclusion, Roma population, program evaluation and social economy for the vulnerable groups. I focused on several elements: design of social policies, institutional and legislative analyses, role of the social factors in the development and implementation of policies of inclusion, results of the programs and projects addressing the vulnerable groups, sources of financing for the programs, role of social economy in enhancing social inclusion.

Furthermore, I explored means of social inclusion by an active participation in the surveyed communities. I proposed patterns of evaluating the social programs: ex-ante evaluation, process, impact and ex-post evaluation.

I contributed to the fundamentation of policies for inclusion regarding the Roma population, the street children, the working children, the trafficked children.

1.3. PRESENTATION OF THE THESIS

This habilitation thesis presents the significant results of the research conducted after 2006.

The thesis has two objectives.

First, a uniform presentation of the research in which I participated, relevant to the social inclusion and to the interdependent fields.

Second, it shows that these researches allowed a more clear definition of several aspects and a better support for the social inclusion in terms of epistemology, methodology and of the social policies.

Six groups of results are presented in support of these statements:

1. The social inclusion developed under the umbrella of the social policies is a constant preoccupation for the public institutions, for the associations and for the academic environment. We are presenting results of the studies conducted from all three directions.
2. Support for the definition of social inclusion and for the identification of the ways to enhance it among the vulnerable groups. We analysed the interactions between these aspects, as well as public/non-public action and social inclusion.

3. The knowledge of the Roma population with all its characteristics allows feasible approaches for the social inclusion in terms of education, health, occupation and general access to services. A natural consequence is the design of inclusion policies based on concrete data.

4. The evaluation of social inclusion programs is a necessary activity whose purpose is to make adjustments and readjustments allowing the accomplishment of the set objectives.

5. The capacity of absorption becomes imperative for the efficientization of the process of planning, development and implementation of the programs/projects financed by the European Union in the field of social inclusion, following the transfer of positive community practices between the old and new member states and for the use of all available resources.

6. Social economy is a field whose activities must be expanded so that the benefits for the vulnerable groups become visible and sustainable.

Although the paper presents much of my research activity, many results are not detailed here, mainly because it would enlarge the area of presentation of the social inclusion of the vulnerable groups.

Although there is an important number of a common conceptual, methodological and applicative element between these areas, the relation between the two fields is essential for the papers presented here.

I didn't make reference to the researches regarding the situation of the children at risk. The specific relations between the children in situations of vulnerability and the social inclusion are mentioned in the following books:

I. Mărginean, S. Cojocaru (coordinators) (2006), S. Cace, co-author, *Services to children and families. Impact of Holt programs in Romania. Documentation of outcomes*, Expert Projects, Iasi;

G. Roman, S. Cace (2004), *Rapid Assessment of Trafficking in Children for Labour and Sexual Exploitation in Romania*, International Labour Organization, Geneva;

D. S. Costin, S. Cace (coordinators) (2003), *The street between fascination and servitude* (in Romanian), UNICEF;

S. Cace (coordinator) (2002) *The working Roma children and their families. Socio-cultural characteristics and conditions of life*, RO Media, Bucharest;

M. Bulgaru (coordinator) (2000), S. Cace, co-author, *Street children in Chisinau*, The State University of Moldova, UNICEF, Chisinau;

I. Mihăilescu (coordinator) (2000), S. Cace, co-author, *A decade of transition, situation of the child and family in Romania. The street children, a confusing reality*, UNICEF;

G. Alexandrescu (coordinator) (1999), S. Cace, co-author, *National study regarding the situation of the street children*, Save the Children.

I also didn't present several papers regarding the Roma population to which I contributed over the past 16 years:

S. Cace, A. M. Preoteasa, F. Irimescu (2004); *The Roma children on the labour market. Case study in Calvini village, Buzău County*, Quality of Life Journal, Romanian Academy, nr. 1-2/2004;

S. Cace, C. Vlădescu (coordinators) (2004); *The Health Status of Roma Population and their access to health care services*, Expert, Bucharest;

M. Ionescu, S. Cace (2003), *Best Practices in Roma Communities*, Agency of Community Development Together, Bucharest;

I. Mărginean, A. M. Preoteasa, I. Precupețu, S. Cace (2002), *Research on the Roma minority*, Journal of Social Work nr. 4-5/2002;

A. Ivanov (coordinator) (2002), *Avoiding the Dependency Trap, a Regional Human Development Report, the Roma in Central and Eastern Europe*, A. Zhelyazkova, B. Slay, M. Marczis, M. Vasecka, N. O' Higgins, S. Cace, T. Sirovatka, United Nations Development Programme, Bratislava;

C. Zamfir, M. Preda (coordinators) (2002), S. Cace, co-author, *The Roma in Romania, Trades and occupations of the Roma population from Romania*, Expert, Bucharest.

This document consists of eight chapters.

Chapter 2 makes an analysis of the social inclusion from two perspectives: of the concepts, as terms in the social policies and as different field of public policy. This chapter approaches both the theoretical component, the definition and interpretation of the terms, particularly in the academic environment, and the institutional component of evolution and coverage in the field of social policies.

Chapter 3 presents the public/social policies, the employment policies for the Roma population and the studies regarding the situation of this population at the national and regional levels. This chapter introduces, particularly, the concepts of public/social policies, employment policies, general socio-economic situation, the factors of access to the social life for the Roma population.

Chapter 4 presents our work regarding the impact of the programs for social inclusion, covering several initiatives: the croissant and milk, the strategy to improve the situation of the Roma population, programs focusing on the Roma people. We conceived different methodologies in agreement with the areas of evaluation and we have shown the results and effects.

Chapter 5 introduces a set of studies referring to the structural funds, to the financing of the programs and to the way in which they can contribute to social inclusion.

Chapter 6 discusses in detail the role of the social economy for the social inclusion, bringing new epistemological elements, optimal methodologies of approach within the Romanian context and solutions to develop this sector.

Chapter 7 present a synthesis of results in 16 years of research.

Chapter 8 gives the plans for the evolution and development of the professional, scientific and academic career.

The paper ends with bibliographic references associated to the content of the first two sections.

2. Social inclusion and policies of social inclusion

2.1. SOCIAL INCLUSION. THEORETICAL AND INSTITUTIONAL APPROACHES

D. Arpinte, A. Baboi, S. Cace, C. Tomescu (Doboş), I. Stănescu (2008), *Policies of social inclusion, Quality of Life, XIX, Romanian Academy, issue 3-4/2008, pp. 339-364.*

The paper was published in *Quality of Life* journal, issue 3-4/2008, by a group of authors specialised in policies of social inclusion. The paper was within the framework of CNCSIS grant "Capacity of the Romanian institutions active in the field of social inclusion to absorb and manage structural funds".

The paper analyses the theoretical perspectives of social inclusion and exclusion. After presenting the origin and context in which these terms appeared, the paper continues by presenting other elements such as: relation of social exclusion with other terms from the social policies such as poverty, marginalization or underclass; the definition of social exclusion; the relation with the social values such as equality or social justice explanative theories regarding the causes and conditions of social exclusion.

According to the detailed analysis of the definition given to social exclusion, a consensus is yet to be reached on the right meaning or on an accurate definition of the concept, even though social exclusion is a term used by the current language of the social policies, both at the institutional level, and at the academic level, in studies.

The paper goes on by analysing the relation between social exclusion/inclusion and the social values. These values may take the form of cultural features of the west-European space where the terms originated.

The next section of the article identifies and analyses the theories on the cases and conditions of social exclusion, which are included in the broader framework of the subjects regarding poverty i.e. the conflictual-type theories and the individualist and cultural theories.

The paper also analyses the relation between social exclusion and inclusion. Social inclusion is much more recent term than social exclusion. From the perspective of the academic environment, two questions arise regarding social inclusion, and answers have to be given to these questions. The first question regards how much social inclusion can be more than an active answer to the situations of exclusions, while the second refers the extent to which we may speak of an impact of social inclusion on the structure of the special programs.

The subsequent part of the article describes the evolution of the social policies at the European level, stressing on the subject of social inclusion. It makes a historic analysis of the documents and treaties which include measures of social integration at the European level: the Treaty of Rome, the Maastricht treaty, the Green Chart, the Amsterdam Treaty. The analysis is accompanied by a set of social indicators covering all the areas of the social policy: economy, demography, employment, social protection, incomes and poverty, gender equality, health and social security.

The European Commission encourages the cooperation between the social partners on matters regarding the professional training at European level, as well as the initiative to draft a multiannual program for social dialogue.

The next section approaches social inclusion in the documents of the social policies in Romania. The concept of *inclusion and social development* was introduced in the Romanian institutional language starting with 2001, when GD 829/2001 regarding the National Anti-poverty Plan and for the Promotion of Social Inclusion - PNAinc, was adopted. One of the important documents on the matter of social exclusion and promotion of social inclusion is the Joint Inclusion Memorandum. The paper describes the purpose of this document and highlights its importance. It also identifies the key-concerns mentioned by the Joint Inclusion Memorandum, which are as follows:

- Higher occupational rate as precondition for the economic and social development and for a higher employment rate, supporting the economic growth;
- Support for the economic reorganisation, to ensure an operational labour market, by enforcing the stipulation from the Labour Code, by developing economic alternatives in the rural areas and by improving the wage policies in correlation with work productivity;
- Better skilled and better adapted workforce;
- Consolidation of the legislative and institutional framework.

In response to these key-challenges, the paper presents the priorities of action which include measures of support for the integration of the people belonging to the discriminated groups.

The paper describes the National Development Plan for 2007-2013, outlining the objectives of this plan. It also describes the general and the specific objectives of the Sectoral Operational Plan for Human Resources Development which sets the priority axes and the major areas of intervention for Romania in the field of human resources, with the purpose to implement the indicative operations and the financial assistance from the European Union through the European Social Fund, within Objective 1 “Convergence”, for the programming period 2007-2013.

The priority axes 2, 5 and 6 for the field of human resources comprise several inclusive measures intended for the vulnerable groups/people in situation of risk/poor communities.

Social inclusion is a documented topic of the European institutions which highlight the major risks perceived as a source for higher inequality and social exclusion: the major changes from the labour market, changes in the demographic structure and higher ethnic diversity, higher role of the ITC sector, changes in the functions and structure of the family, changes in the role of man and woman within the family.

Progress has been achieved on some dimensions: mobilization of the involved social actors (establishment of institutions, engagement of the actors relevant for this process) and higher decentralization, increased role of the local authorities.

In conclusion, the main objectives of social inclusion are: poverty of the people at risk, child poverty, the immigrants, the people with disabilities, low access to medical care for some groups of people, educational disadvantages and vulnerable groups.

2.2. POLICIES OF SOCIAL INCLUSION. ACTORS AND RESPONSES

G. Duminică, S. Cace (coordinators) (2007), *Policies of social inclusion for the vulnerable groups. Increase of the access on the labour market*, AMM Design, Cluj.

The book describes and analyses the European policies of social inclusion and the corresponding policies from Romania for all vulnerable groups. It starts with a review of the evolutions from the social policy of the European Union. The founding treaty of the European Union, of 1992 is the document which set the bases of the common policy within the European context. It makes reference to several documents adopted in time,

which include measures regarding the following objectives: job safety, social protection, equality at work, promoting employment, improving the conditions of life and work, controlling social exclusion and human resources development. The 2000 *Lisbon Strategy* is a major document of the social policies; according to it, the European Union has to create adequate conditions for employment and for regional cohesion.

The paper reviews several social indicators which cover all the areas of social policies and which support the analysis: economy, demography, incomes and poverty, gender equality, health and social security.

A substantial part of the book presents the *Agenda for social policy*, which takes some of the objectives regarding employment and turns them into a 5-year program which includes the priorities of the social policy and the plans of the social action policy.

The concept of social inclusion is presented in a broader meaning. The section begins with terminological references, for a better understanding of the concept of social inclusion and not to mistake it for other concepts. It continues with a review of the concepts of social inclusion and exclusion as they are reflected by the European Union documents.

This section also describes the employment policies in Central and South-eastern Europe and the way in which they were developed. This development, however, took place in different ways, with distinct effects, because these countries started their negotiations for accession at different moments, some of them 2 years apart. Europe is defined by the values of the fundamental human rights so that it aims to promote and integrate these rights in all EU policies and actions.

Thus, this section describes the European strategy for labour force occupation highlighting the importance of the Luxemburg process which outlined the profile of the European policy for labour force occupation. The European Employment Strategy, EES, must cover all three levels of development - at community level, at national level and at regional level - and it must accomplish some major objectives: stimulate labour force occupation, the quality of working conditions, the productivity and control unemployment. The section also describes the transition process of the candidate countries in terms of the European Employment Strategy, and it presents the labour market instrument, the European Social Fund.

The employment policies from the perspective of the accession to the European Union are the steps by which Romania adapted to the European employment policy, and the European requirements which had to be accomplished before the accession. June 1995 was the first step towards accession, when the National Strategy for the preparation of

accession to the European Union has been adopted. This section also describes the way in which one of the employment policies has been implemented, the European Employment Strategy, according to the community acquis, and the way in which Romania got prepared for the European Social Fund.

Much of the section refers to the occupational policies for the vulnerable groups, presenting those programs and measures which lead to a better access to the labour market. The concepts used in Romania and the strategic and institutional documents are presented. The section describes both the European documents and the national politic documents. Several case studies on the employment measures for the vulnerable groups are presented, studies which document the existence of solutions to improve the access on the labour market.

One of the case studies refers to the Centres of Roma people inclusion on the labour market. This program was financed by the European Union and it was operated by the Agency for Community development Together, next to National Agency for Employment and other 4 NGOs, starting with 2002. The general objective of this program was accomplished as documented by the continuity of the project deliverables. The program started with the identification of the jobs available in each of the 5 targets (Cluj, Galați Craiova and Iași Counties, plus Bucharest city) and continued by facilitating the registration of the Roma people in National Agency for Employment database.

This book was published within the project Transnational European Labour Market Integration through Information Technologies – TELMI, project financed by the European Union through INTERREG III B CADSES RO 2004/016-772.05.02.02.07.

2.3. PERSONAL CONTRIBUTIONS

2.3.1. Conceptual clarifications regarding social inclusion

The analysis of social exclusion and inclusion is made from two perspectives: (1) of the concepts, as terms of the social policies, and (2) as different field of public policy. It approaches both the theoretical component, of definition and interpretation of the terms, particularly by the academic environment, and the institutional component, of evolution and coverage by the social policies.

The theoretical perspective starts from the fact that the terms of social exclusion and inclusion originate, rather, from the institutional field, subsequently becoming the

subject of academic debates. First it presents some of the theoretical points of view on the two concepts and then analyses the social inclusion as relation between the institutional knowledge, reflected in a line of public policy, and the scientific knowledge. From the institutional point of view, as field of public policy, it describes the evolution of the policies of social inclusion both in the European Union, and in Romania. It identifies the significant moments of European social policies construction and the position of the policies of social inclusion within them. It also presents the major moments of the process of institutional construction for social inclusion in Romania and identifies the place and role of social inclusion within the public policies, during the periods of pre-accession and post-accession to the European Union.

2.3.2. Policy analyses

Analysis of the European documents on social policies. Among the analysed documents are: the Amsterdam treaty, the Lisbon Strategy, the Joint Inclusion Memorandum and the National Development Plan of Romania; the programs that were described and analysed were: the Operational Sectoral Plan Human Resources Development and the multiannual Phare Program (2004-2006).

3. Roma population

In recent years, studies on Roma population in Europe and Romania have been constantly conducted. Below we are mentioning several such studies: *Țiganii între ignorare și îngrijorare*, ICCV, Gypsies between Ignorance and Concern, coordinators E Zamfir, C. Zamfir, Alternative Publishing House, 1993; *La periferia societății-Romii și serviciile publice in Romania*, At the Brim of Society-Roma and Public Services in Romania, I. Zoon, Resource Center For Roma Communities, 2001; *Romii in Romania*, ICCV, Roma in Romania, The Research Institute on the Quality of Life-coordinators M. Preda and C. Zamfir, Expert Publishing House, 2002; *Avoiding the Dependency Trap, A Regional Human Development Report, The Roma in Central and Eastern Europe*, A. Ivanov (coordinator), United Nations Development Programme, Bratislava, 2002; D. Ringold, *Roma and the Transition in Central and Eastern Europe*, Washington, DC, The World Bank, 2000; D. Ringold, M. A. Orenstein, E. Wilkens, *Roma in an Expanding Europe: Breaking the Poverty Cycle*, World Bank, 2003; S. Cace, G. Duminiță, M. Preda, coordinators, *Evaluarea programelor pentru comunitățile de Romi din Romania-Assessment Report on Roma Community Programmes*, UNDP and the Community Development Agency "Impreună", 2006; G. Duminiță, coordinator, *Accesul Romilor la servicii sociale*, The access of Roma to Social Services, Community Development Agency "Impreună", 2006; S. Cace, M. Ionescu, *Politici publice pentru Roma, Evoluții și perspective, Public policies for Roma, Evolutions and Perspectives*, Expert Publishing House, 2006; F., Gabor, C. Rughinis, *Come Closer. Inclusion and Exclusion of Roma in Present Day Romanian Society*, Bucharest, Human Dynamics, 2008; A. M. Preoteasa, S. Cace, G. Duminiță (coordonatori), *Strategia națională de îmbunătățire a situației romilor: vocea comunităților*, Editura Expert, București, 2009.

3.1. INTERNATIONAL ANALYSES

The international activity which started with the programs of surveying the situation of the Roma population in Central and Eastern Europe (Ivanov, 2002, Avoiding the dependency trap), was continued with the involvement in the national study of the situation of Roma people in the Republic of Moldova, in 2007. Within the same context we also mention the participation in the European initiative Mutual learning program

(<http://www.mutual-learning-employment.net/>) as expert in Roma population employment.

S. Cace, V. Cantarji, N. Sali, M. Alla (2007), *Roma in the Republic of Moldova*, UNDP Moldova

The involvement in this study reveals the international expertise acquired in the field of the Roma population.

The paper describes and analyses the situation of the Roma people at all levels; it also opens ways towards identifying the patterns to solve the social exclusion of the Roma people, as well as towards identifying the policies and programs tailored for the social inclusion of the Roma population. The paper is important for those groups running the risk of social exclusion, process which leads automatically to the maintenance or increase of the poverty level of that population.

The published volume relies on a study, both quantitative and qualitative, worked out at the request of UNDP Moldova.

The quantitative research relied on the regional methodology, applying questionnaires structured by households, and it took place from October 2005 to October 2006. The quantitative study included 1,200 households (600 Roma households and 600 non-Roma households) from 81 localities from the Republic of Moldova. For a better comparison between the Roma and non-Roma populations, we selected the non-Roma households from the vicinity of the Roma communities. The survey aimed to identify the following data about the Roma population: situation; incomes; expenditures and poverty; Roma people education; employment of the labour force market and unemployment; health; living conditions; security and relations within the community and immigration.

The qualitative approach of the research consisted in interviews with the experts in the field (interviews conducted with the representatives of the central authorities, with the people with responsibilities in this field, with Roma NGO leaders, with Roma leaders).

The study shows the socio-demographic situation through the following characteristics: socio-demographic evolution, ethno-demographic factor, emigrational factor and ethno-transformational factors.

In order to determine the size of the Roma population, this report increased by about 20% the census data; this was done on the basis of well-documented estimates. According to the qualitative approach, the representatives of the Roma population mention figures much higher than the official ones, acknowledging the fact that many times the Roma people deny their affiliation to the Roma ethnics because of several

reasons (stereotypes which the non-Roma attribute to the Roma people; discrimination of the Roma ethnics in all social spheres). Regarding the emigrational factor, the Roma people use a pattern of entire household immigration. The most important factor determining the ethnic identity of the Roma population is the linguistic factor. A phenomenon characteristic for a very long period for the Roma communities is the early marriage, the minimal age being 15, below the legal age for marriage.

The incomes, expenditure and the poverty are factors and indicators which show the level of poverty in which the Roma population lives. Almost half of the Roma live in extreme poverty because the system of social protection is less efficient than in the other countries of the region and because of the inefficient distribution of the benefits.

The report analyses the situation of the Roma communities as well as the situation of the non-Roma communities by presenting the following indicators: incomes, expenditure, source of incomes; structure of the expenditure. According to the study, in 2005, the ratio of the average income per capita and the minimal requirement for a living is 47% for the Roma population and 90% for the non-Roma population. The nature of the expenditure tends to focus on food items, showing the level of poverty of the Roma population, as well as the disadvantageous conditions of living. The following characteristics have been identified as influencing the level of poverty of the Roma population: employment, occupational status, self-evaluation of the status, type of job in terms of skills, hierarchical position and level of the wage.

The level of poverty influences directly the level of Roma people education. It is therefore necessary to make investments in the education of the Roma people and to increase their human potential because this will bring a higher level of instruction and, implicitly, a higher rate of employment and of incomes among the Roma people.

The education of the Roma people is analysed through the following characteristics level of education and of literacy, graduated schools, school attendance, rate of school dropout, cause of school dropout and accessibility of the educational institutions. The level of education and the literacy of the Roma population are much below the national average. The survey showed that 21% of the Roma are illiterates, compared to just 2% of the non-Roma people. Among the causes of the fail to attend the school, which the study identified, are the lack of income, the children are not encouraged to go to school, discrimination, early marriages, migration of the entire family.

Employment contributes significantly to social inclusion. Same as a high level of education leads to the decrease of the level of poverty, a proper job determines decent, optimal conditions of life accepted by the society. The level of skills influences automatically the type of job which the Roma people can perform: most of them are

unskilled agricultural workers, which shows that education tends to be a factor because of which the Roma people accept badly paid jobs. One of the characteristics of the Roma population is its involvement in occasional activities. Less than half of the Roma own agricultural land. Encouraging the small business might be one way leading to economic growth and the Roma seem to be able thus to adapt easier to the changes on the labour market. However, most of the Roma don't do anything to initiate and legalise own business, while those who started own business tend not to keep the initial level.

The health state and the inequitable access to health care services tend to be a problem for the Roma population. The following indicators of the health state have been analysed, life expectancy, infant mortality and mother mortality, which showed to be much different from the similar indicators at EU level. The life expectancy of the Roma population is 3 years lower than the expectancy of the non-Roma population. In the Republic of Moldova, just 23% of the Roma people have health insurance. The index of infant mortality determined by this survey is rather high, 29‰, which shows the standard of life of the Roma population and the vulnerability of this ethnic group.

The security and the relations within the community are very important in terms of the policies of social inclusion. Among the problems which the Roma population feels, the study identified the following, which are more significant: lack of access to health protection, the fear of hunger, insufficient income, lack of access to health-care services, lack of education and lack of physical security. A lack of stable incomes has been noticed; however when the incomes exist, they are rather low, leading to the food insecurity for the Roma population.

The economic and political insecurity felt in the Republic of Moldova influenced the emigration of the population to work abroad. Most of the Moldavian immigrants, over 70%, work with no legal papers and thus without enjoying the rights which the ordinary citizens have in the countries of destination. According to the survey data, in most Roma households the remittances are used for the current consumption, real estate investments and paying debts. These directions are understandable because they are influenced by the poor living conditions from the country of origin.

The data of this report and the UNDP data are extremely important because they will serve other authors interested in the same field, providing statistics at several key-levels.

3.2. PUBLIC POLICY AND EMPLOYMENT POLICY AT NATIONAL LEVEL

M. Ionescu; S. Cace (2006), *Public Policies for Roma. Evolutions and Perspectives*, Editura Expert, București.

The paper written together with Mariea Ionescu is a continuation of a program initiated by the Institute for Quality of Life Research, which studied and presented the public policies having impact on the Roma population. The public policies are those policies that must answer the needs of the society using the necessary means and resources in order to accomplish their objective, and the policies for the Roma population experienced a continuous development.

The paper presents socio-economic data for 1990-2005, regarding the Roma from Romania. The general indicators regarding the Roma communities concern the size of the Roma population, the demographic structure of this population, the evolution of the standard of living and the poverty among the Roma communities. Data from 1992 were compared with data from 2002.

In order to explain the dynamics of the social actors' involvement in the Roma problems, the survey analysed three distinct periods of evolution of the public policies for the Roma population from Romania - 1990-1995, 1996-2001 and 2001-2005. The year 2001 has been marked by the development and institutionalization of an important document: the National strategy for the improvement of the situation of the Roma people living in Romania.

Development and implementation of public policies for the Roma people in 1996-2005 - this part shows the way in which several public policies have been established and developed during this period. In order to present the public policies targeting the Roma people in 1996-2000, we described and analysed the following characteristics: the legislative and institutional framework of that period, affirmative institutional measures, political representation of the Roma community in Romania, the Roma nongovernmental sector. A distinct section was dedicated to 2001-2005 period just because of the development and implementation of the Governmental Strategy to improve the situation of the Roma people, for which we presented the political and social context for the strategy, the process of implementation and the mechanisms of monitoring and evaluation of the strategy.

The period 1996-2005 has been marked by frequent changes of the institutional framework and of the institutional representatives, so that there has been a period of continuous change which slowed many of the public policies for the Roma people. The contribution of the academia to this activity is extremely important, particularly through the Roma graduates which it can train and who can become speakers for their ethnic group.

Perspectives of the public policies to improve the situation of the Roma people - they make known the main initiatives that may improve the situation of the Roma in Romania.

This section reviews the following initiatives which aim to improve the situation of the Roma population during the subsequent years: Governmental Strategy to improve the situation of the Roma people, National Antipoverty Plan for the Improvement of Social Inclusion (PNAinc), Plan of priority measures for European integration, for 2005 (elements of public policy developed in order to improve the situation of the Roma people can also be found in the strategy), Joint Inclusion Memorandum (document highlighting the social inequality and poverty), Education Fund for the Roma (FER), Decade for Roma inclusion (adopted by eight countries from Central and Eastern Europe, for 2005-2015). The Governmental Strategy to improve the situation of the Roma people is the significant document of public policy regarding the Roma population.

The *diversity of the public policies for the Roma developed by the social actors and their complexity* shows some similarities and complementarities of the public policies for the Roma population.

The following items were analysed: complexity of the public policies for the Roma population, accomplished after the establishment of the National Agency for the Roma people, 2004; complementarity of the language of the public policies for the Roma population, which stressed on the institutional, national and international language; complementarity of the objectives and of the results throughout the implementation of the public policies for the Roma population, which presents the objectives of the documents mentioned above.

In terms of the costs of the public policies, the PHARE program for 2001-2004 relied on the plan of measures included in the Governmental Strategy.

Starting with December 2004, Romania signed the multiannual PHARE program 2004-2006. The PHARE program could be accessed following the preparations of the Government of Romania to sign the Joint Inclusion Memorandum. The chapter ends with several recommendations to implement the public policies for the Roma from Romania function of the identified needs, with proposals regarding the human resources at the central and local plan.

The *case study* presents the The Open Society Foundation and the programs for the Roma population because it is the significant promoter of the public policies for the Roma population in Romania. The Open Society Foundation supports the Roma communities: they run 29 projects for the Roma people in 1997, while in the next year

they focused on the priority problems identified for 13 areas. The chapter presents in detail the projects financed in the area of Support for the non-governmental organisations of the Roma people and in the area of Professional training for the Roma people. The description of these areas is followed by a description of the projects financed in these two areas, showing the relevance of the projects run by The Open Society Foundation in general.

Although progress has been noticed if we take into consideration the large number of running projects, an acute lack of capacity for project generation and to access the funds made available by various financers, has been noticed. We may also detect the lack of strategic medium-term and long-term planning, which yields deficient project strategy and management, while project continuity is uncertain (p. 115).

Methodology

In order to display the situation of the Roma people from Romania, several documents and statistical data have been analysed. The data sources consisted mainly in: 1992 and 2002 censuses; Barometer of public opinion made in October 2002 by The Open Society Foundation Society and Metro Media Transilvania. The quantitative analysis also used the data from the database of Research Institute for Quality of Life 1992 and "Roma people 1998".

The evolution of the public policies has been described after the analysis of several selected legislative documents among which the Governmental Strategy to improve the situation of the Roma people, National Antipoverty Plan for the Improvement of Social Inclusion (implementation period 2002-2012), Joint Inclusion Memorandum (period of implementation 2005-2010), Decade for Roma inclusion (period of implementation 2005-2015).

This paper plays an important role in understanding this area because it describes and analyses it highlighting the actors important for the establishment, institutionalisation and application of the public policies for the Roma population from Romania.

M. Ionescu, S.Cace (coordonatori) (2006), *Employment Policies for Roma*, Editura Expert, Bucureşti.

The paper brings information on the occupational status and on the access of the Roma people on the labour market, reviewing the situation of the 1990 decade.

The *situation of the Roma population employment* in Romania is illustrated by several socio-economic data regarding the Roma population and the dynamics of the labour market. It presents the situation of employment, the dynamics of the Roma trades and professions, with data from 1992 and 1998 surveys.

Analysing several researches on the involvement of the Roma people on the labour market, one can show that the low professional training of the Roma people yields several characteristics of this ethnic community. Thus, the Roma population has fewer qualifications which facilitate the access on the labour market, which gives a much lower rate of occupation than the national average; many Roma ethnics have no profession or qualification and many of them work as casual workers. The paper shows the 2002 situation of the employed people and highlights the situation of the Roma people in relation with the labour market, noticing that many of the Roma people don't have a job and they become increasingly dependent on various forms of governmental and local financial support.

The perception of the problems confronting the Roma population is another subject of study debated in this paper, the problems of the Roma families being an important aspect of their situation. The most important problems perceived by the Roma people relate to the low level of their incomes, directly influenced by the lack of jobs. The behaviour of the Roma people on the labour market was studied using the following criteria: the intention to seek a job; the barriers hindering the access to a job; ways of seeking a job.

The paper describes and analyses the factors hindering the access of the Roma population to the labour market. It analysed the problems of the Roma population and the role of the public institutions which may cause or prevent the adverse effects of the exclusion of the Roma people from the labour market.

While in the first part the paper presented the factors which have mutual influence and which yield a position on the exclusion of the Roma population from the labour market, factors identified during the field research, part two will refer to the most important such factors: lack of stimulations, lack due to the structure of the extended Roma household, educational disadvantages and abilities which have no place on the work place, low mobility, a general problem on the Romanian labour market; employment in the informal economy, which involves several adverse consequences; discrimination as adverse long-term effect. All these factors have influences many times and we may often speak of a cumulation of factors which result in the social exclusion of the Roma population from the labour market.

The paper presents several programs for Roma people inclusion. It shows the policies promoted by the public institutions for the professional inclusion of the Roma population on the labour market in Romania, making reference to the 2001 Governmental Strategy to improve the situation of the Roma people. It discussed the adoption of this strategy and its plans of measures, strategy which eventually ended in the mere existence of a document used as reference. Another program of the Government of Romania, the National Plan for Employment 2004-2005, is a program showing the difficulties which the Roma people experience when they want to access the labour market. There is no specific objective for the Roma population even though some actual measures have been adopted. The activity of the nongovernmental sector is also mentioned, because it aimed mainly to increase the access of the Roma population to the labour market by job creation especially for the Roma people.

The presentation of the employment policies from the perspective of the European Union accession illustrates the influence of the employment policies for the Roma population and how they were run in order to accomplish the community acquis, stressing on the relevance of the structural funds in the process of preparing the accession of Romania to the European Union.

Several European pre-accession policies for employment have been also presented. These policies are part of the community acquis, which Romania must accept in order to become European Union member state. The most important document is the European Employment Strategy, adopted by the Luxemburg Council of Europe in November 1997. The European employment policies use several financial instruments among which the following structural funds: *European Regional Development Fund for (ERDF)*, *European Social Fund (ESF)*, *European Agricultural Guidance and Guarantee Fund (EAGGF)* - section "Guidance", and *Financial Instrument for Fishery Guidance (FIFG)*.

The paper gives three case studies which show clearly the way in which the projects have been implemented. The first case study referred to the project Stimulation of employing Roma clerks in the local administration and public services. The second case study, the Centre for professional inclusion for the Roma, the job exchange for the Roma people-Agency for Community Development "Together", is a project which runs on the basis of three projects with European financing. The last case study refers to the Formation of the social assistants for the Roma population within the local councils-County Council Giurgiu, project financed by PHARE, Development of the Civil Society 2000.

Problems, solutions and recommendations regarding the Roma population are presented, focusing on the inclusion of the Roma people on the labour market.

Methodology

The first part is an analysis of the research performed until 2006 and it focuses on the census of 2002. These researches are both from the 1990 years and more recent ones, showing thus the evolution of the labour market and of the Roma population from 1990 to 2005.

In order to observe the involvement of the Roma people on the labour market we used relevant data on labour force occupation from Research Institute for Quality of Life studies, comparing the surveys from 1992 with those from 1998: proportion of the different types of professions in overall population aged 16+; proportion of the types of professions by generation; occupational status of the population aged 16+, level of qualification and structure of the employed population according to the professional status.

In order to reveal the behaviour of the Roma people on the labour market and to show the situation of the employed population in 2002, we used the data from a nationwide survey conducted in 2002 by the Centre of Health Policies and Services and by the Open Society Institute-New York. This survey used a standardised questionnaire which was applied to the Roma population from Romania. The sample consisted of 1,500 households with a total of about 8,000 people.

We also used the data from the 2002 census, in order to show the situation of employment. For these data we made a synthetic presentation of the indicators, as they were defined by INS (National Institute of Statistics).

The analysis of the legislative documents, such as HG 430/2001 for the approval of the Strategy of the Government of Romania to improve the situation of the Roma people, was included in a report, *Protection of minorities. Evaluation of the Strategy of the Government of Romania to improve the situation of the Roma people. Program monitoring the process of accession to the European Union*. Open Society Institute, 2002. Another document that was analysed was the *National Plan for employment 2004-2005, directing line 7- Promote the integration and control the discrimination of the people disadvantaged on the labour market*.

The paper analysed the data supplied by National Agency Employment, presenting the results of the employment programs implemented from 2001 to 2006.

We also made an analysis of the significant European provisions in the field of employment, before the accession of Romania to the European Union, among which: the Amsterdam treaty, which is the legal basis of the European Employment Strategy, as well as the 1997 European Employment Strategy. We also analysed the National Plan of Development 2007-2013.

The paper also gives some case studies performed by us. We preferred a qualitative approach, which is a comprehensive method. This presumed an elaborate process of data collection and a thorough analysis/interpretation of the data.

S. Cace (coordinator) (2007), *Access of the Roma people on the labour market. Aspirations, factors and strategies for success*, Expert, Bucharest.

The low educational level is one of the significant factors for the exclusion of the Roma people from the labour market. Even if the school attendance increased among the Roma population, they still have the lowest proportion of graduates for all the levels of education, as shown by the 2002 census. In order to understand better the problem of Roma people employment we analysed several statistics provided by the 2002 census, relevant data showing the factors which lead to a low occupational level. The paper gives the number and proportion of the active occupied population by ethnic affiliation, as well as other indicators such as sector of activity, groups of occupations or gender. The analysis also used data on the inactive population depending on gender and data on the professional status by ethnic affiliation.

The analysis of these indicators was necessary in order to show the vulnerability of the Roma population on the labour market and to reveal the significant factors leading to the exclusion of the Roma population from the labour market.

The paper presented and analysed the role which the public institutions have regarding the employment of the Roma population, as well as the measures considered for the inclusion of the Roma people on the labour market. Each identified factor leading to the exclusion of the Roma population from the labour market is presented in detail: lack of stimulants or of support networks (environment shaped, mostly, by the governmental policies), educational disadvantages and lack of abilities, low mobility, informal work and discrimination. Education is the significant factor limiting the access of the Roma people of the labour market, because the Roma are less educated than the non-Roma. The informal work is one the factors which influence adversely the access to education, to economic security and to the health care system.

We made a comparative analysis of the employment policies for the Roma people implemented in the regions of development. The analysis starts with an overview of the international and national context. At the European level, the employment policy implemented by the European Union is the one stated in the European Employment Strategy, whose financial instrument is the European Social Fund. Romania adopted the directing lines of this strategy through the national employment policy. The regional

analyses of the Roma people employment are very relevant because the regions differ in terms of approach and preoccupation for this matter.

The *community actions to increase the employment rate of the Roma populations* have been presented using several case studies. These case studies covered communities from different regions in order to reveal the different approach and preoccupation by regions of development. The following communities have been selected for the case studies: “Drum la Roșu”, Giulești neighbourhood, District 6, Bucharest, which is a marginalised community as immediate consequence of the phenomenon of gentrification (p. 68); Deaj village, Mica commune, Mureș County – people going to work in other places from Romania or abroad; Răzvani village, Lehlui Gară commune, Călărași County - many people working informally in Bucharest; Șugatag village, Ocna Șugatag commune, Maramureș County - the mixed marriages lead to the social integration of the Roma among the non-Roma; Sector village, Ulmeni commune, Călărași County – most villagers are engaged in subsistence agriculture, are casual workers or go abroad to work.

The paper gives some individual strategies for success, some life stories of Roma people from different regions, working in different jobs and who graduated different forms of education. Among them there are graduates of sociology or social work from the Faculty of Sociology and Social Work of the Bucharest University, which currently has special seats for Roma people. These life stories detail the pleasant or unpleasant life experiences with the educational and professional environment, experiences due to the ethnic population to which they belong. They reveal the stages they went through on the labour market, showing how hard or how easy seemed for them the access to education and on the labour market.

S. Cace, A. M. Preoteasa, C. Tomescu, S. Stănescu (2010), *Legal and equal on the labour market for the Roma communities. Diagnosis of the factors influencing the employment level of the Roma population from Romania*, Expert, Bucharest.

The study was conducted within the project „L@EGAL 2 - European investment for the future of the Roma people from Romania”, co-financed from the European Social Fund “Invest in people!” through the Sectoral Operational Plan for Human Resources Development 2007-2013, priority axis 6 - Promotion of social inclusion / Major area of intervention 6.2. - Improving the access and participation of the vulnerable groups on the labour market.

We conducted a diagnosis of the factors that influence the employment level of the Roma population from Romania and made some recommendations.

The data presented in the work have been produced by the surveys conducted during the project: qualitative and quantitative surveys conducted by the Research Institute for Quality of Life in May-September 2010. The quantitative survey used a probabilistic, two-stage, stratified sample designed on the basis of the principles of the Barometer for Roma inclusion. The sample included 1,537 self-identified Roma people, aged 15+. The subjects responded to a questionnaire covering several topics. The qualitative survey used in-depth interviews (with experts in Roma problems, leaders of the Roma community, local and county officials), focus-groups, case studies and life stories of some Roma people from the community. The qualitative data were collected in July 2010. The survey included 12 communities from 6 counties: Cluj, Vaslui, Mureş, Teleorman, Brăila and Ilfov. (pp. 7-8)

The analysis of the public projects impacting on the Roma population from Romania reveals the significant measures regarding the Roma people adopted at the international and national levels. We focused on the national policies and analysed the public sectoral policies regarding the employment as well as the public policies from other areas that influence the rate of Roma people employment (health, education and dwelling). Besides the analysis of the public policies, the paper also presents the following aspects: socio-economic problems of the Roma people, situation of the Roma people on the labour market and perceptions of the institutional representatives regarding the employment programs for the Roma people. To this purpose we used ANOFM reports.

It has been noticed that the problem of Roma people employment is recognised at the national, European and international levels. The analysis revealed that progress has been made in Romania at the following levels: institutional, educational (allocation of special seats for the Roma people in universities), occupational (setting up the employment caravans for the Roma people, employment of the sanitary mediators) and legal (solving the problem of identity papers for the Roma people). The analysis of the national framework of public policies showed the importance of the accession to the European Union, the lack of a pragmatic document adequate to the new social-economic situation and the need for a higher institutional capacity to draw-up and implement public policies documents (p. 30).

The survey data show that the proportion of the Roma people having stable occupations (employed or having traditional occupations or trades) is of about 27% from the total population of active age (15-64) (p. 33).

The paper continues by giving relevant data on the occupational status of the Roma people: number of employed people, areas of activity, traditional trades of the Roma, spreading and potential of the traditional activities, qualification of the Roma people, entrepreneurial involvement of the Roma people, start of working activity, work history, satisfaction with the job, job safety, characteristics and components of the unoccupied Roma population and attitudes towards work.

The factors which cause the exclusion of the Roma people from the labour market are: the low level of education, culture and educational values, relation between the social origin and the level of education, the health state of the Roma population (the study speaks of health state evaluation), work values, standard of living, dwelling, ethnic discrimination, political representation within the community, alternative strategies (mobility and migration).

The rate of occupation in the surveyed Roma communities was analysed by the following indicators: level and profile of occupation in the surveyed communities, types and opportunities facilitating occupational activities in the communities, county-level programs for Roma people inclusion on the labour market, perception of BJR representatives regarding the programs for Roma people inclusion on the labour market, knowledge of National Agency for Employment programs by the Roma people from the surveyed communities.

Many of the interviewed Roma people displayed common elements which have also been identified by other reports as characteristics of the Roma people regarding occupation. These characteristics are: low level of occupation on the formal labour market; high proportion of the Roma people working as casual workers or informally, without workbook and without social insurance; the low educational capital compared with the majority population; social assistance provided to a consistent proportion of Roma people by the minimal guaranteed income; low efficiency so far of the programs for inclusion of the Roma people on the labour market, operated by the county and central authorities (p. 81).

It has been noticed that regional experts tend to have a critical perception of the programs for inclusion of the Roma people on the labour market, while the visibility of National Agency for Employment programs is almost null among the Roma people.

The conclusions are presented for each characteristic of this problem: Roma people occupation; education and level of aspirations; health state; family pattern and solidarity networks; dwelling, migration, at the level of institutions and employers (informal employment, on-the-job qualifications are not recognised; low interest of the employers for the Roma people; negative stereotypes regarding Roma people work; discrimination;

political representation), problems regarding the programs that facilitate Roma people employment.

This volume is of real interest for this field because it gives clear recommendations as to what has to be done in order to increase the social inclusion of the Roma population from Romania.

3.3. PERSONAL CONTRIBUTIONS

In this field, as concerning the initiated and evolved social policies in Romania referring to the Roma population, there is to be noticed the comprehensive way of study to be presented in different types of complex problems the Romanian society is confronting with, referring to the analyzed subject. A synthesis to the significant given contributions underlines two consolidated directions that joined their own courses to bring significant contributions by the made researches.

- The comprehensive analysis of the public and social policies by applying some integrative quantitative and qualitative methodologies;
- The specifically analysis for the occupational policies addressed to the Roma people.

3.3.1 The comprehensive analysis of the public and social policies by applying some integrative quantitative and qualitative methodologies.

In a special way there are to be exposed in the long way the applied social policies for three distinct periods of time after the Romanian December period (1990-1995 and 2001-2005). Also, by the diversity of the Roma public policies' diversity, of the social actors and their complementarity there are mentioned a series of similarities and complementarities of the Roma policies, a reason for which we have made for the first time a complementarity analysis.

1. The complementarity of the public policies for the Roma, made by creating the National Agency for the Roma, in 2004;
2. The complementarity of the public Roma policies language, where there was an accent on the institutional, national and international language;

3. The complementarity of the objectives and of the results during the implementation of public policies for the Roma population, where there are presented the objectives of the documents mentioned above.

A certification of the integrative methodology as concerning the analysis of the public/social policies about the Roma population, depends on the analysis methodological area for the Roma from the Moldavia Republic, a sense in which we created a reference medium under the guiding of an international organization (UNDP). From this point of view, there is to be underlined the fact that we made a quantification of the Roma population's situation to all the levels, creating the valid premises for identifying the outlining types of action for the social exclusion of the Roma but also of the policies and programmes for the social inclusion for the Roma population. By this contribution of methodological transfer of analyzing the public policies in a neighboring space to Romania, we have managed a positioning in the social policies of the Roma groups that are subject to the social exclusion, a process that I consider to be significant for maintaining or rising the poverty degree the population in discussion is into already.

3.3.2 The specific evaluation for the occupational policies addressed to the Roma people.

A second significant contribution that we registered in this field refers to the creation of an occupational policies' diagnosis addressed to the Roma, in the context that there are asked new vectors for the modernization and flexibilisation of the work market from the European point of view. From this point of view we interviewed the Roma population that has less qualifications to facilitate the access on the work market which leads to a lower occupational degree comparing to the national one, and a big percentage doesn't have any qualification or job and a big number of working-days from the total of the Roma population. The presented factors are: the lack of some support, a lack caused by the big structure of a Roma family; the educational disadvantages and of some abilities that do not have any meaning on the work market; low mobility, which is a very frequent problem that they confront with on the Romanian work market; to work illegally that leads to a series of negative consequences; discrimination as a harming phenomenon on long term. From the integration perspective in the European Union we underlined the influence of the occupational policies concerning the Roma problems and how these went on for getting to the communitarian acquis, accentuating on the relevance of the structural funds in preparing Romania's integration to the European Union and also on the solutions and recommendations referring to the Roma population, especially talking about the Roma inclusion part on the work market.

An important mention concerning the contribution in this sector of occupation refer to the underlining of the theme in a distinct research, a repositioning of the occupational policies in the context of the present crisis. In the volume *“Legal and equal on the work market for the Roma communities. The diagnosis of the factors that influence the occupational level of the Roma population in Romania”*, we paid more attention to the fields that influence the level of occupation for the Roma population (health, education and living condition), as well as to the characteristic important aspects for this population group: the socio economical problems of the Roma people, the Roma situation on the work market and the perceptions of the institutional representatives concerning the occupational programmes addressed to the Roma population. As an innovative study we underlined the progresses registered on the following steps:

1. At the institutional level, educational level (by giving a number of places for the Roma in universities);
2. At an occupational level (by organizing the occupational caravans for the Roma, the employment of the sanitary mediators)
3. At the official level, more exactly the official fate of some Roma (by solving the problem of the identity papers for the Roma)

The occupational level for the Roma population hold also qualitative studies where there were analyzed the following items: the level and the profile of the occupation inside the studied communities, types of facilitation opportunities for occupations in communities, the programmes for the Roma inclusion on the work market, the regional representatives perceptions concerning the Roma, to know the National Agency for Employment programmes among the Roma from the studied communities. We have also suggested a series of solutions for strengthening the inclusion programs on the work market on many coordinates: concerning the Roma occupational level, the education and the aspiration level, the health level, a family type and solidarity nets, the living, migration at the institutional and employers' level (the informal occupation, the refusal of recognizing the qualifications received at the place of work, low interest for the Roma from the part of the employees, negative stereotypes of the Roma work, discrimination, political representation) and concerning the problems about the programmes that facilitate the Roma occupation. In a defining way there are brought in the social action plan, punctual solutions to facilitate the access on the work market, action recommendations at the local level that could be the responsibility of the experts for the Roma population problems.

Inside this contributive direction, at the level of the occupational policies addressed to the Roma population we underlined and brought sustainable arguments to underline the importance of the educational field to prove the vulnerability of the Roma population on the work market by identifying the significant factors that lead to the Roma exclusion on the work market. From this point of view we used gradual exposing of the social Romanian system that tend to be considered rather complicated because of the social benefits it offers and which doesn't manage entirely to protect. So, as concerning the personal contribution we have structured and described the compared analysis about the occupational policies for the Roma population at the level of the evolution regions, we gave examples of the communitarian tries to rise the level of occupation for the Roma population by a series of case studies and finally we managed to make a presentation as individual success strategies of a series of life stories of some Roma that hold some functions and who graduated different forms of study, coming from different regions. By this type of study, we have noticed that the programmes for the Roma population have to take into account the factors that influence the Roma exclusion on the work market as to be found ways for enriching the legal and economical field with specifically measures for the Roma population.

4. Program evaluation and social inclusion

4.1. CROISSANT AND MILK – PERCEPTIONS, ATTITUDES AND EFFICIENCY

D. Arpinte, S. Cace, M. Preotesei, C. Tomescu (2009), *Croissant and milk - perceptions, attitudes and efficiency*, Expert, Bucharest

The volume, *Croissant and milk - perceptions, attitudes and efficiency* details aspects regarding the design of the evaluative survey; context of the program; analysis of the public policies addressed to healthy children diets given the high rate of obesity among the young people and the practices of other countries regarding the feeding programs addressed to the school children; analysis of the legislative framework specific to this program; actual analysis of the program by evaluating the relevance, legitimacy and efficiency of the program; perceptive evaluation of the program in terms of distribution of responsibilities for children education and health at the family and school level, attitude regarding the program, quality of the products and impact on the consumption behaviour of these products, program management and identification of alternative or adjustment proposals; conclusions on the survey results in terms of strengths and weaknesses and drawing up proposals for program efficientization.

The study of program design aimed to evaluate the impact and efficiency of *Croissant and milk* program was performed by ECHOSOC foundation in July-November 2009. The study involves the evaluation of the subjective social and institutional perceptions (representatives of the Ministry of Education and Research, Ministry of Labour, teachers, parents and family doctors) on the efficiency and efficacy of the program. The employed methodology was preponderantly qualitative using semi-structured interviews as research method. The respondents have been selected using the snowball method. We interviewed 130 people from 9 localities (4 towns: Constanța, Bacău, Iași, Brașov; 4 communes: Bârnova, Negri, Cristian, Limanu and Bucharest city). The distribution of the types of interview within one locality was as follows: 3 interviews within the educational institutional framework – school principal and 2 teachers / educators, 1 interview with a family doctor and 8 interviews with the parents of the

school children from grades 1-8. Furthermore, the evaluation also involves the analysis of the evolution of some social indicators and an analysis of the specific legislative framework of the program.

The program was a result of the recommendations of the “National Plan Anti-Poverty and for the Promotion of Social Inclusion” regarding the necessity to develop the support policies addressed to the vulnerable groups. The school-age children belonging to the vulnerable groups can benefit of support measures alongside the school services. The inclusion of the children in vulnerable groups is due to the precarious financial situation of the family and to the health problems confronting them, such as obesity, due to improper diets. These informations are supported by World Bank estimates on the higher proportion of children who will live in absolute poverty from 5.7% to 7.4% in 2009.

Program implementation must be also understood from the perspective of the European actions to alleviate the social inequalities by providing complex educational services (after-school, day-care centres), by providing a free meal or by subsidizing it. At the European level there is a long tradition in providing healthy meals in schools by implementing dietary programs for the school children. Examples of such countries are: United Kingdom, Spain, Italy, Sweden, Finland, Germany, France and Czech Republic.

Croissant and milk program provides universalist benefits, irrespective of the contribution of the beneficiaries to social insurances. The direct beneficiaries are the school children from grades 1 – 8 and the pre-school children, a total of 2,150,000 children in 2009, in average.

The analysis of the specific legislative framework of the program reveals several normative acts with direct implications on the program: OUG no. 96/ 2002, OUG no. 70/ 14.08.2003, HG no. 882/ 04.08.2005, OUG no. 95/ 2008, OUG no. 714/2008 and HG no. 32/ 2009. Initially, the program addressed only the children from the elementary education, grades 1-4, being expanded in 2009 to the middle education and pre-school education- the kindergartens with a normal program of 4 hours. The legislation also stipulated that the products will be distributed on a daily basis, twice a week, or once a week, depending on the distance between the particular locality and the distributor.

The actual analysis of the program considers three evaluation criteria: relevance, legitimacy and efficiency.

Program relevance is revealed in the case when the children belong to families on low income, living in areas, particularly Roma population. From the perspective of the

category from of children with a good financial basis, the program is a waste of resources, a populist method to obtain political support.

The strategy of assigning beneficiaries within this program gives it legitimacy, because it adopted a universal perspective, even if not all the children actually needed this benefit. However, a selective perspective would have generated a lot of frustration among the positively discriminated school children, because they would have been stigmatized, and among the negatively discriminated school children, who would not have considered it fair. Thus, the universal strategy legitimates the program.

The efficiency of the program is noticed more from the better health state, by the constant source of food for the children coming from poor families and by the healthier snack than those which the children might have bought from the shops around the school, than from better school performance, where the impact is almost null. However, there was a good efficiency on school attendance, because the program provides food for the poor children whose parents would hardly be able to buy the minimal food requirements for survival.

The perceptive evaluation of the program considered:

- Distribution of the responsibilities regarding children education and health at the family and school level. The family is the institution with the most important role in child socialization. However, if the parent are little involved in the education of their children, the sanitary education included, the school takes over some of the parent responsibilities. However, the educational system doesn't excel in many aspects, and it even displays some major deficiencies too. The paper shows that *Croissant and milk* program is an initiative of the educational system to counteract the lack of interest or the lack of knowledge of the parents regarding the diets of their children;
- The attitude regarding the program varies with the residential area. Thus, the croissant and milk were consumed in a proportion of 90% in the rural areas, and of just 10-60% in urban areas. The children from the rural areas who don't consume these products give them to their household animals, while the children from the urban areas either give them to other children who eat them or waste these products in various forms;
- The quality of the products and the impact on the consumption behaviour. The very poor quality of the bakery products and sometimes of the dairy products when they are distributed even though they are deteriorated, makes the children refrain from eating them or use them as play instruments. Furthermore, the lack of attractiveness of the

products, due to the packing, or because they are given for long periods, decreases the consumption of these products;

- Program management involves deficiencies in the communication between the beneficiaries and the suppliers in order to improve the quality of the products and to adapt them to the requirements of the beneficiaries in terms of storage conditions;
- Identification of alternative or adjustment proposals for the program. The interviews showed the perception of a need to maintain the program in its current universalist addressing form, highlighting, however, the need for measures to be efficient. Thus, there have been proposals to improve the quality of the products and their attractiveness by varying the type of supplied product; the decentralisation of the entire process would allow the use of local suppliers, which would be much more open than the regional/national suppliers in improving the communication with the beneficiaries. The alternatives to the program consider the provision of fruits or honey, proposals which increase the burden of the didactic staff, but which would provide for a better health state of the children; also mentioned were the attractiveness of the products and the expansion of services as after-school programs, but these alternatives cannot be eligible due to the additional high costs associated to them, particularly within the context of the current economic and financial crisis and of the low capacity of providing services towards the beneficiaries.

The conclusions of the paper are given in the form of strengths (meeting a real and important social need, the universalist perspective of granting the benefits), and weaknesses (high rate of wasting because the products are used to purposes other than feeding, the poor quality of the products and their low attractiveness because of the lack of variation; improper storage conditions, thus product degradation) of the program.

The significant proposals for program efficacy and efficiency regard a higher quality and attractiveness of the products; use of local sources of products and local suppliers; decentralization of program management towards the local authorities; control the waste of products by sanctioning or redistributing the products within the school to the children who actually eat them; development of complex services (after-school) or contract catering firms for hot meals.

4.2. NATIONAL STRATEGY TO IMPROVE THE SITUATION OF ROMA PEOPLE

A. M. Preoteasa, S. Cace, G. Duminica (coordinators) (2009), *National strategy to improve the situation of Roma people: voice of the communities*, Expert, Bucharest.

The study aims to evaluate the manner of strategy implementation with the purpose of its adjustment according to the proposals of the Roma civil society.

The first part of the paper which evaluates the *National strategy to improve the situation of Roma people* describes the context in which this strategy was developed. The emergence of this strategy was one of the political criteria stated during the negotiations for accession to the European Union. It was institutionalised in 2001, through HG no. 430/2001, and the General Plan of Measures has been adapted to new requirements by HG 522/2006. The underlying principles of the strategy are the following: accordance-collaboration of the Government of Romania with the specific organisations of the Roma people; social usefulness-the need to adapt the measures to the necessities of the Roma communities; "sectoral distribution"-division of responsibilities in agreement with the expertise of the institutions involved in the process of strategy implementation; decentralisation-responsibility of the local authorities on Roma issues; identity differentiation-allow the assertion of Roma identity as minority; equality-non-discrimination of other categories of people within the process of solving the problems of the Roma community. The institutional framework of the strategy was changed frequently both at the level at the state institutions, and at the level of the staff; situations in which a particular Roma organisation was favoured in the establishment of partnerships have also been noticed. This aspect was criticised by the European organisation in terms of governmental lack of interest for the Roma problems. The significant institutions involved in the process of strategy implementation were: at the central level-the *Joint Monitoring Committee*, the SGG, OPR, DRI, the *National Agency for the Roma People* (ANR), the *National Council for the Control of Discrimination* (CNCD); at the county level-the County Bureaus for the Roma People; at the local level-the local experts for the Roma working in the town halls.

The paper analyses the national and regional framework for public policies specific to the Roma population. At the national level, the public policies addressing the Roma people come from three sources: the program of Governance; the national plan of policies adapted to the European policies and the national strategies and plans for social inclusion concerning the employment, health, education and dwelling matters. At the regional level, the policies of social inclusion of the Roma population are supported through the *Regional Plan of development* (2007-2013), the *Regional plans of action for labour force employment and social inclusion-PRAO* (2009-2011); the *Plan for PRAO implementation* and the *Regional plan of action for theoretical and professional education* (2009-2013). The public policies addressing the Roma population include: the *National Strategy for Improving the Situation of Roma people* (2001-2010), the *National Anti-poverty Plan for the Promotion of Social Inclusion-PNAinc* (2002-2012); the *Joint Inclusion Memorandum-JIM* (2005-2010) and the *Decade of Roma People Inclusion* (2005-2015). All the measures of

public policy addressing the Roma community are developed and implemented in agreement with the national specificity, while taking into consideration the objectives of the European policies. Furthermore, National Development Plan specifies the necessity to synchronise the national public policies with the European intervention using structural funds.

The evaluation of the mechanisms and actors responsible for the implementation of the strategy are other important sections of the paper. At the county level, the analysis addresses the BJR and the Joint Workgroups of the institutional representatives at the county level. At the local level, the strategy is implemented by local experts, sanitary mediators or school mediators working within the town hall. The results of the survey documented the existence of poor operational mechanisms which function only formally and the existence of actors without the power of decision to solve the problems, playing just the role of passing along the specific problems to the executive authorities.

The civil society plays an important role in the implementation of the strategy. The paper presents and analyses the importance of the strategy in the agenda of the nongovernmental organisations. The civil society was intensely involved alongside the Government of Romania in the development of the strategy via the Workgroup of the Roma Associations (GLAR). However, after the strategy was institutionalised by the Government, the cooperation with the civil sector turned increasingly deficient. The implementation of the strategy was excessively politicized, which drew a lot of criticism from the EU. The agenda of the Roma organisations shows the low interest for strategy implementation. The lack of reaction from the civil society may be explained by the deficiencies of communication between the organisations that might have monitored the public policies addressing the Roma population.

The strategy for the Roma people is also analysed from the perspective of ensuring the measures for gender equality, because the gender is a transversal variable specific to multiple discrimination: the Roma women are much more vulnerable than the Roma men. The paper analyses the way in which the measures addressing the Roma women were developed, the extent to which the measures have been implemented and the factors of success and failure accompanying the implementation of these measures. The analysis showed that the strategy gives importance to the needs of the entire community, with no differences according to the needs at the individual level. The measures addressing the women tackle the sector of human health by the programs of family planning, sanitary information, medical examination and support to the mother and child; the economic sector by stimulating the entrepreneurial spirit among the women and the juridical sector by preventing and solving the cases of violence where the women were victims in most situations.

The paper also presents the role of the European funds in the accomplishment of the strategy objectives. The funds for the Roma communities were generally used for education and employment purposes, neglecting thus a very important aspect: the dwelling. This latter aspect influences the revival capacity of the other sectors of intervention.

Conclusions and recommendations: the permanent monitoring of strategy implementation with the purpose to adjust it to the arising problems and necessities; employment of specialists within the institutions; consultancy services for BJR representatives to learn how to access structural funds; public-private collaboration promoting the active measures which improve the situation of the Roma people; improvement of the public policies and of the institutional framework.

Methodologically, the paper included both desk research which analysed the existing studies which evaluated the strategy, and field research. The field survey used a qualitative methodology: case studies by semi-structured interviews. The survey methodology and instruments have been developed after discussions with experts in the evaluation and implementation of public policies.

The analysis of the local level activities used only field data which the Agency "Together" obtained by July 2008. The project of the Agency "Together" operated in 99 communities from 24 counties covering 7 regions of development. This study selected only 6 of the 7 regions, function of the GDP per capita in 2008 and estimated in 2009, and function of the proportion of the Roma population within the total population of the region. This survey selected the following regions: North-East; South-East; South-Muntenia; West, North-West and Centre. In each region we selected 1-2 counties function of the coherence of the county plan for the Roma people and function of BJR involvement in the Roma problem. Initially there were 11 selected counties, and from these we kept just 5: Arad, Călărași. Cluj, Vaslui and Galați, where we conducted 10 case studies at the local level, in 2 communities from each county.

During the second stage we interviewed the actors involved in the implementation of the strategy, as well as representatives of the Roma communities. Furthermore, we conducted 30 focus-groups at the local and county level with the actors involved in the implementation of the strategy and with representatives of the Roma communities. At the national and regional level we interviewed key-actors for the Roma problems. Additional information from the local/county level were obtained from the administrative and archive data regarding the implementation of the strategy in the 10 selected communities.

The data were examined by content analysis and by discourse analysis. The aim was to detect the strengths and weaknesses of the mechanisms for strategy implementation, the factors of success/failure for the implementation, the effects of the implementation at the local level and the positive or negative practices which developed during the implementation of the strategy.

4.3. EVALUATION AT THE FIELD, PROGRAM AND PROJECT LEVEL

S. Cace, G. Duminičă, M. Preda (coordinators) (2006), *Evaluation of the programs for the Roma communities from Romania*, AMM Design, Cluj Napoca, UNDP.

The answers to the Roma problems from the public agenda became visible starting with 2000, then GLAR alliance was established, when PHARE programs addressing the Roma communities started and when the “National Strategy for the Improvement of Roma People Situation” was adopted. The initiatives addressing the Roma communities entered a new stage starting with 2005, when the Decade for Roma People Inclusion started. This calls for an evaluation of the impact which the governmental measures, the public policies and the programs/projects elaborated and implemented until 2004, included, had on the Roma communities.

The first part of the evaluation identifies the significant financers of the actions addressing the Roma communities, describing and evaluating the procedures of financing/monitoring and evaluation of the projects. The financing of the projects/programs addressing the Roma people is analysed on different time periods. Thus, in 1990-1997 there was no integrated strategy, rather a fragmented one, with the significant financers being the European Union and the Open Society Foundation Romania. The period 1998-2001 was noticed for the initiatives of public policies addressing the situation of the Roma communities. Upon pressure from the European Union, the Government was the significant initiator of the Governmental Strategy for the Improvement of Roma People Situation. Moreover, the first integrated program targeting the Roma population also started: Phare 1998. Open Society Foundation Romania was also involved in the Roma problems by outlining and applying a coherent strategy or programs/projects addressing the Roma communities, which targeted socio-economic problems: Education, health state, professional qualification, improvement of the situation of the young Roma by providing them opportunities to graduate higher education. The third period, 2001-2004 was noticed for the involvement of the Government of Romania in the co-financing of the projects/programs with European financing, and for the development and adoption of the “National Strategy for the

Improvement of Roma People Situation". During this period, Open Society Foundation Romania changed its institutional structure, supplying funds, know-how and programs specific for the Roma communities towards the Soros Open Network of organisations. The Centre for Resources for the Roma Communities took over these projects/programs.

The procedures for financing/monitoring/evaluation vary the monetary and temporal dimension of the financing with the sources of financing. The public sources of financing such as those allocated by the European Union have a complex, inflexible bureaucratic system of financing/monitoring/evaluation. The program is planned by negotiations between the national institutions of the beneficiary country and the European institutions, taking into consideration the priority objectives of the European strategies. The next stage is the Project Card, which guides the subsequent actions of financing. The projects are selected by competition. The significant procedures of financing are synthesized in the Applicant Guidebook. The standardization of this document provides the same type of information for evaluation: the first section gives a brief presentation of the program, details on its objectives, context of the program, the available budget and the financing limits; the second section shows the rules of application for financing, while section three includes the appendixes for the application. The rules of project/program application for financing refer to eligibility, drawing up the financing applications and actual submission of the projects. The financing proposal is evaluated in three stages. A list of the submitted projects is compiled, then the eligibility, the administrative conformity, the technical and financial quality of each project is analysed with a standard grid. The next stage is contracting, which presumes the official notification of the contracting, visits, additional documents to the project proposal, drawing up and signing the contract papers. A specific aspect of this type of financing is the long period, 6 to 12 months, needed to go through all the stages of project/program financing. This type of financing presumes complex procedures of financing, with a high level of expertise and financial resources that extends over a long period.

UNICEF provides mixed sources of financing. This type of financing implies a higher level of flexibility. The organisation plans its annual budget according to the priorities it sets. The initial project ideas are negotiated together with the applicants or with the partners from the program/project and then put into the „Country Program Action Plan“.

The private sources of financing are represented by Charles Stewart Mott Foundation and by the Open Society Foundation, which have flexible procedures. In the case of the first organisation, the priorities and patterns of interaction are negotiated together with the beneficiaries of the grant and are adapted while the project is running, depending on the emerging situations; it also provides assistance to the beneficiaries for a specific

period. By 2000, Open Society Foundation Romania had developed a much more flexible system of financing than the European Union system based on calls for projects.

The differences between the public and the private sources of financing can be noticed in aspects such as: higher level of complexity and standardization in the case of the public sources, implicitly higher human and financial resources needed for the application, a longer period before actually getting the financing, maximal competitiveness level to get the funds, rigid narrative and financial reports.

The information detailed above is complemented by the perceptions of the representatives of some financing bodies regarding the:

- The financing strategies addressing the Roma communities: the strategies developed by the NGOs do not address exclusively the Roma communities and have a wide range of priority areas; the “National Strategy for the Improvement of Roma People Situation” displays deficiencies of implementation;
- Correlation between the indicators of the strategy and those of the project;
- Role of the NGOs in the Roma problem: in identifying the needs of the community, in providing solutions of intervention in the community and in stimulating the participation of the Roma community in the proposed projects;
- Geographical distribution of the financed projects: in all regions of Romania, mostly in the area of Bucharest and in Transylvania, but poor representation in southern Romania;
- Areas of priority intervention in the Roma communities: dwelling, relations with the authorities (identification cards), health care, education, employment.

The second part of the analysis evaluates 19 projects addressing the Roma communities in terms of their relevance, efficacy, efficiency, replicability and gender approach. Their relevance is operationalized through: relevance within the national/local context, involvement of the local authorities and community involvement within the project. Community participation is visible more in the infrastructure and health care projects. Efficacy is operationalized through: outcomes to objectives ratio, effects and impact, project sustainability. Efficiency is defined by: budget / results relation and outcomes to available resources ratio. The employment and infrastructure projects had low efficiency scores. These projects, employment and infrastructure, also have lower gender approach scores than the education and health care projects. The employment and infrastructure projects generally had lower scores because of the difficulty to ensure the sustainability and visibility of the results.

In terms of the priority area of intervention, the educational programs/projects missed the education of the adult Roma and the opportunities of higher education for the young Roma; they developed vague monitoring objectives and indicators which are difficult to measure; they don't ensure project sustainability and replicability by the dissemination of the positive practices. The dwelling and infrastructure programs for the construction/reconstruction of roads depend on the involvement of the community for their replication. On the other hand, the projects of construction/renovation of dwellings were confronted with two priority issues: the right of property and the lack of identification papers. In order to amplify the impact of the infrastructure and dwelling projects on the Roma communities, there is need for an improved access on the workforce market, to educational and health care services. The employment programs/projects supplemented the passive measures provided by the state with active measures such as the income-generating activities and the programs for professional qualification/requalification. The recommendations of the financing institutions/organisations in the field of employment stress the need to institutionalise and apply the practices of positive discrimination; another recommendation regards the information on the job exchange for the Roma people. This type of program proposes to increase the employment opportunities by starting small businesses, by the entrepreneurial support for the Roma people in order to start own businesses and the qualification of the Roma people in agreement with the demands on the labour market. The programs/projects addressing health care issues, which have positive practices, have to be disseminated by NGOs and subsequently, if needed, by the public institutions.

The third part of the analysis argues in support of the necessity to develop the public policies in the field of education and to control discrimination, as well as to develop a multi-sectoral strategy able to respond to the situations of cumulative risk specific to the Roma communities. The recommendations highlight the need for: a complementary and synchronised effort of the financing institutions in order to be able to cover all the areas of intervention from the "Strategy to Improve the Situation of the Roma People"; partnerships with the mass-media; efficient communication of the information on the opportunities for financing; multiple financing for a particular field of the strategy; insertion of the highly qualified young Roma within the public institutions; franchising some social services by public-private partnerships; promotion of, and financial support for the researches evaluating the impact of the programs/projects and for the identification of the needs of the Roma population and of the professional niches.

The employed methodology is rather complex: the analysis of the interventions on the public policies addressing the Roma communities used qualitative methods of interviewing the institutional representatives of the financing institutions; the analysis

also inspected documentation from the financing bodies and from the secondary sources. The evaluation of the impact produced by the project selected for analysis was performed using both quantitative methods for data collection by questionnaires and for secondary data processing, and qualitative methods of interviewing the implementers, the beneficiaries and the partners. The sample in the first analysis was of availability. In the second analysis, the 20 case studies were selected function of the financing criterion, the areas of project/program operation and the type of institution which implements the project/program. Scales of scores were used to evaluate the impact of the projects.

The analysis of the public policies generates the situational indicators that explain the effects of the initiatives of financing and the outcomes of the projects and programs addressing the Roma communities.

4.4. PERSONAL CONTRIBUTIONS

The evaluative field from the social policies plan has a reference point in the plan of the personal contributions and it is completed with the making of step by step and actional evaluations in the following directions:

- The evaluation of the strategic and programmed documents in the field of the social inclusion;
- The multidimensional evaluation of the programmes in the field of the Roma policy;
- The evaluation of the impact and benefits of a distinct programme.

The contributive relevance characteristic to this field sacrificed temporarily by drawing and applying some distinct methodological rules applied for each realized analyze. From this point of view, the importance of the contributions identify the authenticity and innovation elements of the strategy's, programmes and projects evaluation inside the social inclusion.

4.4.1. The evaluation of the strategic and programmed documents in the field of the social inclusion. In a definite way we have applied a complementary research design applied to implementation evaluation of "The National Strategy for the Improvement of Roma People Situation": an office research where the evaluation studies were analyzed on the Strategy made to that moment, as well as a field one. In the analysis table we made a systemic description of a correlative series of specific contextual items for the strategy's implementation: the historical, institutional and judicial reason for the strategy's evolution, the mechanisms and the responsible actors

for the strategy's implementation, the gender equality as a transversal solution characteristic to the multiple discrimination the research's results showed weak functional mechanisms that were functional only at the formal level and actors with no power of decision in solving some problem situations but only having the quality of transmitting the problems to the executive authorities. Also, there are relevant the final conclusions and recommendations: the permanent monitoring of the strategy's implementation: the permanent monitoring of the strategy's implementation concerning its adjustment to the problems and necessities met; to employ specialist persons inside the institutions, consultancy services for the BJR representatives concerning the accessing of the structural funds, the collaboration public-private to promote the active measurements for the Roma's situation strengthening.

4.4.2. The multidimensional evaluation of the programmes in the field of the roma policy.

A significant aspect of the evaluation refers to the significant supporters' identity in the Roma problems, the description and the evaluation of the financing/monitoring/evaluation procedures of the projects. We have also made a description of the projects' financing/ the programmes destined to the Roma communities, being made in different temporal periods, we have also shown a series of evaluated projects and have argued the idea that there is necessary the evolution of the public policies in the educational field and the excluding of discrimination, the elaboration of a multisectorial strategy to respond to the risk cumulative situations characteristic to the Roma communities.

4.4.3. The evaluation of the impact and benefits of a distinct programme.

An evaluation of a recent initiative inside the governmental programmes from Romania refer to the evaluation of the impact and the Bread and Milk programme efficiency by the effective analysis of it, having three evaluation criterions: relevance, legitimacy and efficiency. In the study plan there is to be made a comparative analysis from a universal perspective and a selective one too. The programme's implementation is also exposed from the perspective of the European actions state for lowering the social differences by offering some complex scholar services (after-schools and daily centers), to offer a free meal or to support this financially. The evaluation's results are described under the sign of the strong points (to solve a real, important social need, but also the universal perspective of granting the benefits) and weak of the schedule (the big degree of wasting in the case of using the products with some other purposes than the ones to assure the

feeding; the week quality of the products and their low attraction for the children because of the week variation of products' offer).

5. Capacity of European funds absorption

5.1. ABSORPTION CAPACITY. INTEGRATING PERSPECTIVES

C. Cace, S. Cace, C. Iova, V. Nicolăescu (2009). *Absorption capacity of the structural funds. Integrating perspectives*, Journal of social research and intervention, 27, pp. 7-28.

Within the context of the global economic recession, the new EU member states must make constant efforts to optimize their capacity of absorption of the European funds during the pre-accession period, mainly to preserve their level of development, rather than narrowing the gap between the EU member states. Thus, the evaluation of the absorption capacity becomes imperative for the efficientization of the process of planning, development and implementation of the programs/projects financed by the EU, following the transfer of positive community practices between the older and new EU member state, the use of all available resources and in order to avoid the occurrence of a "saturation point" in funds absorption.

The significant publications in the field of the administrative capacity come both from national experts and from the reports of the European Commission or of other European institutions, or from the consultants collaborating with them. Among the significant papers are: Herve, I. and Holzmann. R. (1998), *Fiscal Transfers and Economic Convergence in the EU: An Analysis of Absorption Problems and an Evaluation of the Literature*; Kalman, J. (2002), *Possible Structural Funds Absorption Problems*; NEI (2002) *Absorption capacity for Structural Funds in the regions of Slovenia*; ÖIR (2003), *A Study on the Efficiency of the Implementation Methods for Structural Funds*; World Bank (2004) *Aid Effectiveness and Financing Modalities*; Horvath, A. (2005), *Why does Nobody Care About the Absorption*; Emerson, M. et. al. (2006), *Just what is this „absorption capacity“ of the European Union?* Constantin, D. (2008). *How Well Prepared are the New Member States to absorb the EU Funds? Reflections on the administrative capacity*; Wostner, P. (2008) *The Microefficiency of EU Cohesion Policy*; Tomescu, C. and Stănescu, I. (2009), *The absorption capacity of European Union funds for social inclusion. An analysis into the PHARE 2004-2005 grants*

beneficiaries; Zaman, G. and Georgescu, G. (2009), Structural Fund Absorption: a New Challenge for Romania.

Following is the chronological evolution of the European instruments of financing, as well as the evolution of the financial assistance that was granted. We may notice a significant increase of the budget allocated after 1999, which increased constantly. Changes also were noticed in the strategic objectives proposed for 2000-2006 and for 2007-2013. During the first period, the principles of the programs regarded: focusing on the priority objectives of the strategy; programming strategic, rather than isolated actions; establishment of partnerships with other member states, with intermediary administrative structures or with other interested actors; supplementation of the national expenditure by European funds. During the period 2007-2013, the structural instrument was guided by three major goals on the basis of which the national strategies have been outlined, namely: strategies of convergence-in the regions with the GDP per capita 75% below the European average and in the regions classified below the average European level of the changes following the accession of the new member states; strategies of competitiveness and regional occupation-in the regions not eligible for convergence; and strategies for territorial European cooperation aiming the transnational, cross-border and inter-regional cooperation.

The discussions at the European level regarding the actual benefits of Romania after its accession and due to the absorption of the structural funds tend to gain momentum on the background of the economic and financial crisis and of the materialization of the first pre-accession stage (the first three years-2010), implicitly, of the finalization of at least one cycle of implemented structural projects/programs. The initial prognosis of 3.9%-7.3% growth of the GDP for the new EU member states from the Central and Eastern Europe has been influenced adversely by the economic and financial regression, because the reaction of recovery could not be accomplished fast and foreign loans had to be accessed. Furthermore, the absorption difficulties (Zaman, Georgescu, 2009), are due to the lack of long-term perspective of the authorities; to the difficulties in getting resources for co-financing; to the local and central administrative capacity and to the deficient communication between institutions; to the failure of the public-private partnership; to the limited capacity of the staff. Moreover, there was lack of transparency in the allocation of the structural funds and coherence of their absorption (Horvath, 2005, p. 9), administrative overloading (Bauer, 2001), as well as other factors at the national level (Zaman, Georgescu, 2009): the political system, the economic policies, the actual structure of the economy and the administrative capacity. The deficiencies in the absorption of the structural funds (Kalman, 2002) would also be due to the orientation towards consumption rather towards investments; to the deficient temporal

planning; to the lack of information of the empowered institutions regarding the situation of the transfers and to the failure to prioritize the needs.

The second section of the paper defines the absorption capacity and tries to make an extensive list of factors which determine it. The absorption capacity of a country is its ability to use efficiently the financial resources allocated through the structural funds. The absorption capacity can be understood from the perspective of demand (beneficiaries of the funds) or of the offer (the institutional framework for funds administration). This concept is operationalized from the perspective of the offer through the following dimensions: “macroeconomic capacity of absorption”-the possibility of co-financing the structural projects and programs, and the “administrative capacity of absorption”-the ability of the institutional staff at the local and central level to draw up in due time the documentation needed for the application for structural projects/programs, the selection of eligible projects, the preparation of the framework necessary to facilitate the partnerships, the financing and monitoring of program/project implementation. The efficientization of the capacity for structural funds absorption is determined by the European and national actors, by the officials implementing or managing the projects/programs, by the context and rules of implementation of the structural projects/programs specific to the member state, to the region or community where the project is to be implemented, by the procedures and systems of implementation adapted to the context.

According to the survey by OIR (2003), the positive practices of structural funds absorption refer to the: planning of the structural strategies by negotiations between the central and regional authorities; establishment of management structures supporting the implementation; establishment of intermediary structures specialised in project implementation; perform ex-ante and intermediary evaluations with the purpose to improve implementation; establish provisions of non-reimbursable funds by observing the due dates of payment.

The subject of the third section is the “point of saturation” in the absorption of structural funds and its correlation with the GDP of the member states receiving financial support in the form of structural funds. The “point of saturation” is determined by the totality of the macroeconomic, institutional, socio-cultural, infrastructure and human capital constraints. It refers to the situation in which beyond a specific level of the GDP, the European financial support generates little economic growth. The state of the absorption capacity of the funds is negatively correlated with the length of the period when the “saturation point” is reached. Thus, the member states characterised by a high degree of absorption of the structural funds seldom meet with situations of saturation because they use the resources in a time as short as possible.

Methodologically, the paper is a study of official documents such as: reports of the organisations/institutions empowered to manage structural funds, of the experts collaborating with these organisations/institutions and of independent experts. The study covers the period 2000 – 2009, extending throughout the European community. The charts and tables used in the analysis show the European instruments of financing; operationalization of the administrative capacity; the EU pattern of funds implementation; the EU administrative system of funds allocation and the constraints of the absorption capacity.

5.2. ABSORPTION OF THE STRUCTURAL FUNDS IN ROMANIA

C. Cace, S. Cace, V. Nicolăescu (2011). Absorption of the structural funds in Romania, *The Romanian Journal of Economic Forecasting*, 15(2), pp. 84-106.

The discussion of the recent years regarding the European financial support, within the Romanian government, the civil society and the European institutions empowered to manage these funds, oriented towards the imperative analysis of the structural funds absorption. The purpose of these evaluations was to identify proposals to solve the difficulties of absorption by explaining the discrepancies between the countries which accessed the European Union and to come up with decisions.

This paper joins the current trend to evaluate the degree and difficulties of structural funds absorption, following the constant interest to improve the administrative capacity of absorption before their end in 2015. The paper is one of the many significant contributions to this area of interest, such as: Müller, Kai-Uwe and Mohl, P. (2005) *Structural Funds in an Enlarged E., A Politico- Economic Analysis*; Mairate, A. (2006) *Developing evaluation capacity in the Member States: The case of Structural Funds*; Oprescu, Gh. (coord. 2006) *Analysis of the absorption capacity of the community funds in Romania*; Constantin, D. L. (2009) *How well are the new member states to absorb the EU funds? Reflections on the administrative capacity*; Zaman, Gh. and Georgescu, G. (2009) *Structural Fund Absorption: a New Challenge for Romania?* Morovan, I. (2010) *Are we according to the schedule? 2010: first conclusions – use of the structural funds.*

The introductory part of the paper gives a brief account of the process of budget allocation for the structural public policies at the European level. The first stage of this process consists in the negotiations between the national governments to decide the total value allocated to a country and the general criterion used to allocate the funds. The second stage involves negotiation at the national level to select the potentially eligible regions, on the basis of “additionality” and “complementarity” and of the specific needs

for structural financing. The selection of regions is also done according to the key indicators which measure the degree of accomplishment of the objectives of the structural public policies such as: the GDP per capita at the purchasing power parity; the unemployment rate at the regional level; the level of qualification measured by the proportion of the active population which graduated a form of tertiary education, at the regional level. Polverari et al. (2005, p. 36) classified the EU member states in three categories according to the priority objectives of the adopted strategy. The first category includes the countries with strategies concerning the regional employment and competitiveness; the second category includes the countries with transitive/mixed strategies; and the third category includes the countries with strategies of convergence, meaning the countries which accessed the EU between May 1st 2004 and January 1st 2007.

The second part of the article shows the differences between EU15 and EU25 in terms of the key indicators of the objectives of the strategy of structural public policies. The analysis was performed using MSFA matrix (matrix for structural funds administration) by Oprescu (coordinator, 2006) and it reveals a deficient administrative capacity for structural funds absorption in the case of Romania and of other EU member states which accessed starting with May 1st 2004. Although the funds allocated to Poland, the Czech Republic, Hungary and Romania account for 79% of the funds available for Central and Eastern Europe, Romania and Poland have the lowest rates of contracting in Central and Eastern Europe. Zaman, Georgescu (2009) claim that the structural funds are used inefficiently following their distribution in rather high proportion to the wealthy countries and to the inefficiency of the governmental political measures. In the case of Romania, another cause would be the failure to develop the projects by stage as planned, so as to allow a constant absorption by the annual deadline of payment, and the deficient governmental capacity to identify sustainable objectives.

The third part of the paper makes an analysis of the indicators of structural funds absorption in Romania, considering the progress of the seven operational programs included in five priority areas: infrastructure at European standards; economic competitiveness; development and efficientization of the human capital; optimization of the administrative capacity and balanced territorial development. The evaluation of the absorption within the operational programs was done by relating the percentage of each program from the total allotment to the percentage set for each program. According to the statistics provided by ACIS for 2009, the programs with the highest allocated financing are POS-T, POS M and POSDRU; PO DCA and PO AT have less than 1% of the total allocated funds. The indicators used to evaluate the efficiency of structural funds allocation refer to the: absolute value of the projects submitted for financing, approved and contracted in 2009 and the absolute value or proportion of payments to the beneficiaries of the projects implemented in 2009. The comparison of December 2009

with January 2009 shows a two-fold increase of the projects applications, the approval of 3,165 more projects, the contracting of 2,034 more projects and three-fold higher value of the payments to the project beneficiaries.

The fourth part of the article describes the significant problems encountered in the management and implementation of the structural programs/projects, as well as the associated solutions. The three major deficiencies identified by Hartwig (1999) regard: the implications of the current economic situation; the lack of statistics necessary for a true cost-benefit analysis and to evaluate the implications of the project/program for the incomes; the lack of procedural administrative expertise specific to the structural funds. The specific problems of Romania regarding the absorption capacity of the structural funds mentioned in the open letter addressed to the Prime Minister of Romania (Cace, Cace, Nicolăescu, 2011, p. 102) refers to the: too long period between the application of the project proposal and the receipt of an answer, or between the approval of the proposal and the signing of the contract; lack of uniform and coherent criteria of evaluation; lengthy delay of payments for the projects; impossibility to recover the value added tax; deficient communication between the management authorities, between the intermediary organisms and the applicants or the beneficiaries of the projects/programs. Solutions are sought at the governmental level for these problems, but the priority goes to the reduction of co-financing and to increasing the system of advance payments.

The analysis of the strategy specific to each country for the allocation of the structural funds, based on the key indicators, was done for 2003-2004 and 2006-2007. Furthermore, the relation with 2003-2004 and 2007-2009/ 2013 was useful for the analysis of the budget allocated for the structural funds in the EU member states before May 1st 2004 and after this moment, in order to explain the discrepancies between countries in terms of their capacity of absorption, by using data sources from other publications or from the databases of the institutions involved in the management of allocation and planning of the structural instruments. Moreover, the evaluation of the absorption capacity of the structural funds in Romania in 2009 was performed by secondary data analysis using data from the Authority for Structural Instruments Coordination.

5.3.PERSONAL CONTRIBUTIONS

5.3.1. Conceptual clarifications regarding the absorption capacity

The definition of the absorption capacity brings in front the important distinction between the international aid offered to the states in “situations of economic and social distress” and the policy of convergence specific to the European area by which funds

specially allocated to the states and regions put into practice this joint decision. If in the first case the purpose is to provide for the functionality of the specific state, in the second case the purpose is to diminish the economic and social gaps in a well defined geographical area in which the principles of competitiveness, knowledge, innovation and research are adopted.

The conceptual clarifications regarding the capacity of structural funds absorption reveals an area which defined its essential operational coordinates (macroeconomic capacity, financial capacity, administrative capacity). The efforts of the researchers to structure the investigated area revealed hierarchical levels at which it operates (European and national), as well as the factors and mechanisms of implementation specific to the allocated funds.

The integration of the identified elements allowed the elaboration of the EU model of structural funds implementation; the European diversity reveals different administrative systems in the absorption of these funds.

The theoretical exercise accomplished by various authors after studies and investigations offer us sufficient arguments to initiate future queries into the stage of structural funds absorption in the new EU member states and to probe the existence of a possible “point of saturation” in funds absorption in other states which benefit of international aid.

5.3.2. Analysis of the absorption capacity of the structural funds in Romania

The structural funds allocated for Romania for the period 2007-2013 are included in the convergence policy of the European Union; difficulties in the absorption of these funds have been observed in the new member states. Discrepancies have also been noticed in the allocation of funds to the new member states, which should generate a much more proactive effort of coordination by the European bodies. The procedures of funds management should be accompanied by sufficiently strong measures so as to attain the objectives set by the national reference strategic plan of each new member state in order to narrow primarily the social and economic gaps.

The explanatory model structured by the proportion of applications to engagements, proportion of reported signed contracts to engagements and rate of the certified expenditure related to engagements showed the existence of a dragging mechanism, lacking the expertise of the planned absorption according to the annual payment

deadlines, characteristics of the incipient stages of absorption, which were also displayed by the member states that joined the EU in May 2004. The standard model for analysis used to synthesize the results noticed throughout the year 2009, showed a swifter rhythm of structural fund absorption by Romania; this expresses largely the efforts of the potential beneficiaries to adapt to the conditions of the financing lines and less a stimulating and selective administrative process concerning the efficiency of the submitted projects.

In agreement with another evaluation of the measures to facilitate absorption by new member states from Central and Eastern Europe (EU10, July 2010: 31), Romania has adopted and continues to adopt measures to make fund absorption more efficient: steps have been taken to improve and accelerate the use of EU funds, raised the amount of available funding to beneficiaries to reduce co-financing pressure and accelerated the advance payments. Additionally to the other states, it offered state guarantees for local governments and eased the eligibility criteria (together with Hungary). However, the low rate of absorption of the structural and cohesion funds shows that the governance of the country has to promote the most adequate measures required to attain the efficiency parameters measurable and comparable with the other states.

The conclusion is that the high efficiency of the structural fund absorption is conditioned by the quality of the governance, in general, and by the institutions of the public administration, in particular (Zaman, Georgescu, 2009:140). The beneficiaries of structural funds in Romania displayed a significant interest as shown by the large number of applications, but which is diluted by the rather modest results of the absorption rate calculated as the ratio of the actual payments to EU 2007-2009 allocation. The statistics presented by the independent evaluations and in the open letters raise sufficient questions concerning the reaction of the management authority to remedy the blockages that were reported and to improve the system of structural fund absorption by Romania.

Finally, it is important to add that this analysis is a radiograph of the present situation, but further investigations are required to identify the optimal solutions to attain better social and economic results as a result of structural fund implementation in Romania.

6. Social economy

6.1. SOCIAL ECONOMY IN EUROPEAN AND NATIONAL CONTEXT

S. Cace (coordinator) (2010), D. Arpinte, N. A. Scoican, H. Theotokatos, E. Koumalatsou, *The European Social Economy*, Expert, Bucharest.

The paper is one of a largest research programme inside the “Proactive-from marginal to inclusive” project, which is financed by the European Social Fund through the Districtual Operational Programme for the Human Resources Development 2007 – 2013.

The work “offers the reader a structured image of a new process of changing/evolution that is strongly begun by the European Union, holding an important place here in Romania” (Catalin Zamfir, Director of the Research Institute for Quality of Live, in *Foreword*, pg. 9).

Most of the times, the concept of social economy refer to all kinds of economical and social activities that take place in many different legal acts inside the public or private sector. The social economy offer new employment opportunities in the economical circuit to some economically excluded social groups, counting on tough competition.

The purpose of the paper is to give a whole image about the social economy at the level of the European Union.

There are presented problems concerning the evolution of the social economy, the theoretical and conceptual approaches of the social economy.

There are presented and analyzed the significant forms of social economy as: the cooperatives, mutual organizations, non-profit organizations (foundations and the associations), social enterprises. The diversity of the social economy at the European level was analyzed by the specialists with the purpose of underlining some characteristic elements at the level of the behavioral forms and for identifying the dynamics of their evolution inside the European Union.

There is underlined the social economy by means of the European regulations, as well as the links between the social economy and the European Union.

The description of the significant actors in the social economy at the European level: European institutions-The European Parliament, the European Commission, associated European forms-The European Economic and Social Committee, national structures with competences in the field of the social economy. There are presented and analyzed the support and financing mechanisms from the point of view of the economical crises. The beneficiaries of the different social economical forms are mentioned in the large area of innovation and sustainable evolution from Europe, on many levels: systemic, interorganizational, organizational, interpersonal and individual.

For determining the extending degree and the characteristics of the social economy, the key questions are:

- Which are the characteristics of the social economy?
- How can we underline better this area as concerning the conceptual point of view?
- How many non-profit and voluntary organizations are there?
- What fields do they operate in?
- What problems do they fight with?
- Which are the regional necessities that the social economy is dealing with?
- Can we understand the social economy as something that fills the gaps there where the market and the government cannot cover the necessities?
- In what way may the social economy play an important part in the social inclusion of the vulnerable groups?

There is to be recognized the rising importance of the social economy by the national authorities and the European Commission.

There are analyzed the financing sources in the European Union: financial agencies, transnational financing mechanisms and organisms, external foundations. There are three significant income sources available for the social economy available organizations: activities that generate profit (service taxes, sales, members' taxes, rents, investments, businesses); the governmental financing (at the central and local level), the governmental financing may be distributed by many traditional forms: subventions,

grants, acquisitions, taxes a person; philanthropy (financial donations and support in nature from the volunteering persons).

There are described the significant economy types from Europe and a part of the good practices in a few of the European countries: Italy, Spain, France, Switzerland, Great Britain, Finland, Poland.

They start from the idea that the social economy has a series of characteristics that differ from a country to other, depending on the type of the activity, the cultural types, the legislation on the run, the jurisdictional acts, the associative traditions and the predominant organizational forms, but also in conformity with the needs that are to be met in each social context and with the characteristics of these needs. As concerning from this point of view, they consider that there in Europe, there are five significant social types of social economy, types that are presented and described: the Anglo-Saxon type, Scandinavian type, the European Continental type, the South-European type, and the model of the central and East European countries.

The painting described inside this work offer a whole image about the social economy field inside the European Union and link directly all he factors that influence the field of the social economy.

The paper support the readers that are interested in the subject of the social economy at a national and international level in the initiation of a new and fascinating opening of socio-economical reform, in which the whole Europe is involved.

S. Cace, D. Arpinte, N. A. Scoican (coordinators) (2010), *The Social Economy in Romania, Two Regional Profiles, Expert, Bucharest.*

Although the social economy seems to be a well oriented concept in the real world, it is actually a relatively new phenomenon which started with just a few decades behind. In Romania, the social economy is a field that is worked on for more than a century as concerning the specifical literature but, the subject actually wasn't analyzed in a substantial way.

The paper has as authors (coordinators) a group of researchers that hold a reach expertize in the field of the social economy (S Cace-coordinator, V Nicolaescu, N. A. Scoican, *The Best Practices in the Field of the Social Economy in Grece and in Other States from the European Union*, 2010; S. Cace-coordinator, D. Arpinte, N. A. Scoican, H. Theotokatos, E. Koumalatsou, *The Social Economy in Europe*, 2010; S. Cace, D. Arpinte, S. Cojocaru, *The Social Economy in Romania. Preliminary Aproach*, The Journal for Research and Social

Intervention, vol. 31, 2010; S. Cace, D. Arpinte, C. Cace, S. Cojocaru, *The Social Economy. An Integrating Approach*, Transilvanian Review of Administrative Sciences, no. 33/E, 2011; S. Cace, C. Cace, V. Nicolaescu, *Economical Competencies in the Field of the Rural Antrepreneurship-Ways and Actual Perspectives* in the volume about the International Scientifical Conferences-Logos Universatility Mentality Education Novelty, 2011; S. Cace, D. Arpinte, C. Cace, S. Cojocaru, *Financial Resources Management-Factors of Sustainable Development of the NGO's Implementing Social Economy Activities*, Transilvanian Review of Administrative Sciences, no.35, 2012).

There are underlined a part of the social economy characteristics in Romania, analizing first of all two evolution regions-South Muntenia and South-West Oltenia.

There are mentioned the conceptual explanations as concerning the social economy as well as the organizations' characteristics that work in the field of the social economy; the characteristics of the social economy field.

The question that we proposed ourselves to answer was: starting from the empirical information (qualitative and quantitative) about the entities of the social economy from Romania (cooperatives, mutual helping homes, nongovernmental organizations) which are their common elements and wich are the different ones? In this way there is presented the situation of the social enterprises from the South West Oltenia region and South Muntenia as from the point of view of the two dimensions, respectively the common and the distinct characteristics.

There is made an enlarged description of the two regions included in the study. So the South-West Oltenia and South Muntenia are characterized by a pronounced dropping of the births level, having a population which is rather old, by a low enough level of economical evolution and an occupational rate. The incomes are also low and the number of the persons that belong to the vulnerable groups is big enough.

The research was made during a year (August 2009-July 2010) and it had two components: qualitative and quantitative.

The qualitative component had rather an exploring purpose being made in the twelve districts from the two regions. There were made researches in each district by collaborating with the institutions that influence the field of the social economy. There were taken interviews from the representatives of the relevant institutions from the representatives of the social economy structures. At the district level, there were interviewed representatives of the Commerce and Industry Room from the Work Field, of the County Social Assistance and Children Protection Institution, of the County Association/Union of the Cooperative Labour Societies, of the County Union for the

Consumption Cooperative, of the County Federation for the Retired Persons. At the local level, there were selected structures that offer services for the vulnerable groups or have a big significance for their integration on the work market: ONGs, mutual helping homes for the employees or the retired, credit, consumption, labour, agricultural cooperatives, which are protected. The exploring character of the study was determined by the reduced degree of knowledge for the social economy field in Romania.

The quantitative component covered the twelve districts and targeted the adult population's investigation and also the structures' representatives that can implement activities for the social economy. For the adult population there were given two big groups of subjects (2675-South Muntenia and 1823-South West Oltenia). The group's size can be explained by the objectives and the thematics of the research. For the adult population there were used two research instruments, the first one addressed to the active persons on the work market and the second one for the unemployed. The dividing was made by the probable selection of the voting sections within the population from the urban field, using the lists since the Romanian presidential elections in 2009. In the data division was used an equilibrium measure that takes into account the report between the population and the group selected as a selection of gender-age-residential field. There were introduced in the quantity's component all used types of entities studied and also in the qualitative component, except the protected workshops because of their small number. There were elaborated research instruments according to a common structure for the concerned entities.

For the cooperatives they used the data from the Commerce Registry for the CARs, the data source being the presence registry for the nonbanking financial institutions BNR. The ONGs were identified from the data base of the Ministry of Labor.

There was made an analysis of the general data concerning the South West Oltenia and South Muntenia regions from the point of view of the economical evolving level and there is concluded that, the two regions are some of the poorest ones from Romania. As from the occupational point of view, according to the National Statistics Institute, the occupational level from the two regions vary between 45% and 47%, situating themselves at low enough levels. As concerning the education, the scholar participation to all the levels of study is a bit higher in Muntenia, both regions being oriented towards the medium national level. As concerning the vulnerable groups, the two regions are confronting with a big number of beneficiaries for the social services.

The field of the social economy is little known by the population from the two regions. The participation degree is also little and depends also on their perception about the potential personal benefits. The perception of the beneficiaries concerning the social

economical services is mainly negative. The concept itself is very little known both by the public institutions' representatives and also by the CARs and CARPs ones. With a few exceptions the perspectives about the future are generally pessimistic both from the point of view of the institutional actors as well as from the entities' representatives from that sector. As from the point of view of the public authorities, ONGs, CARs and cooperatives, in all, there would be necessary a bigger involvement of the status for supporting this sector especially concerning the financing but also by creating a specifically legislative environment. A solution for supporting this field mentioned by the social economy structures respondents is the accessing of the European nonprofit funds.

The structures of the social economy are presented from the point of view of their characteristics and of few critical aspects that the implementing of this normative environment involves. There is presented the profile of the social economy structures from the two regions, the national context of the social economy structures, the present situation of the social economy entities and the necessary conclusions for these aspects. There is appreciated the fact that the potential for solving activities of social economy at the level of the three types of organizations (cooperatives, CARs, ONGs) is reduced. There isn't any legal specifically basis to support the evolving of the social economical activities and the support of the public institutions is reduced. There was identified the lack of a strategy concerning the sector of the social economy, as well as of the clear measurements addressed to the organizations from the social economy field (pg.79).

There is analyzed the participation and the perception about the social economy services taking into account the importance of the organizations that have activity in the field of the social economy, the participation of the individuals in the organizations' activity for the social economy and the perceptions concerning the activities and the quality of the services for the social economy. The analysis of the social economy institutions' importance is made by fields of residence, this fact underlining the existence of an important differentiation between the rural and the urban population. The activities of the social economy organizations are regarded by the involved persons mainly as a source of profit. The number of persons that subscribed to the social economy entities' services is little, which didn't allow the drawing of a representative statistical profile as concerning the evaluations from this point of view.

The perception of the social economy from the point of view of the representatives of the social economy structures being careful to the level of knowledge about the concept itself as social economy, as well as the evaluation of the social economy status to present, the evolution of the social economy from the period of the socialist party towards the future. There is shown an interest about the representatives perception

concerning the initiatives and the suggestions for the activities' enrichment for the social economy and legislative suggestions for the support of the social economy.

As concerning *The Profile of the Employment Population and the Need for Social Economy*, there is analyzed the relationship between the social economy and the occupational status and there are shown the busy population's characteristics from the two samples for the two regions (South Muntenia and South West Oltenia), underlining also the data of the population in all.

The analysis underlines the fact that the two areas are characterized by the existence of a small number of work places available for the existing active free population and especially for the disadvantaged social categories. In the two regions, the problem of the reduced level of occupation on the work market has a structural determination created by the lack of good orientation of the work force for the real offer of work places.

Being one of the little studies made in our country in the field of social economy, "The Social Economy in Romania: two regional profiles", it manages to form an objective, complex and critical aspect of the existing situation of this field in Romania, offering in the same time trustful suggestions for enriching. It would be better for the future initiatives of this kind to be extended in some other areas of the country to have an assembly image and to notice both the pluses and the minuses from the national level, as well as the ones specifically to each region apart, creating this way a basis for the future measurements and politics in the field.

S. Cace (coordinator) (2010), V. Nicolaescu, A. N. Scoican, *The Best Practices in the Social Economy Field in Greece and in Other States of the European Union*, Expert, Bucharest.

The transfer of good practices has as purpose the giving of the information at the level of the social national partnerships of the good practices from other member states of the European Union in the field of the social economy, "Evaluation" and "good practices" may be analyzed interdisciplinary in the social field which needs an exact defining but also an analysis of these areas as concerning the relation between evaluation and good practices (pg.12).

The purpose of the paper is to offer an as accurate as possible framing of the social economy in the integration European policies for social inclusion and to offer a series of good practices examples registered in Greece and in other states of the European Union. The paper intends to underline the best practices in the social economy in Greece and other states of the European Union, having as significant target to become a support

component for the implementation of the right actions for strengthening the social entrepreneurship in the regions South Muntenia and South West Oltenia.

The evolution of the organizations from the social economy have to count on the best practices from the field. Keeping in mind this aspect there is considered benefic to be described the methodological approaches referring to the geographical orientation of the social economy at the local and regional level. This analysis represents a sequence about the methods' orientation the study of the social and economical evolution for the creation of places of work and of the entrepreneurship initiatives from the field of the social economy. In these conditions, there is to be established a significant material for the involved researchers in the geographical defining of the social economy. For managing this purpose, there was made an office research, being identified and analyzed the existent research projects for this field and especially the methodological approaches that were used.

The waited result refers to the experiences, capacities and good practices transfer inside the nongovernmental organizations coming from different socio-cultural situations.

In the first part there is presented the importance of the social economy inside the European policies for social inclusion, they refer to the European context of an inclusive society, there are exposed the significant coordinates of the social inclusion European policies which are correlated with the specifically initiatives of the social economy.

In the second part of the paper they talk about the methodological aspects concerning the evaluation of the social economy field, there is intended the geographical localization of the social economy as well as the defining and identification of the best practices in the field of the social economy. There are described the significant characteristics of the good practices in the social field, there are made a series of mentions as concerning the importance and the part of the monitoring and evaluation of the social economy structures by using some scientifically methods of research and there are underlined the results registered from other studies that have as purpose the mentioning of the good practices in the field of the social economy.

The type of applying research is determined by the specifically objectives of the research. There are two objectives of it: the first one intends to describe and analyze the activities of the social economy organizations, their financing mechanisms and their relationship with the community or other groups; the second one-the notices of the study will be used to underline the effects of the activities from the social economy in the targeted groups. According to these objectives, the type of applicative research is both descriptive and analytical. The descriptive type uses the investigated groups. The methods for collecting the data are a combination of the qualitative ones with the

quantitative ones and they used: questioners holding quantitative data, cases studies, interviews, focus groups. As concerning the questioners, the significant data have to be correlated by each initiative just to understand the level and covering degree. The information from the interviews, focus groups and case studies may be used to exemplify and enrich the results of the quantitative research.

As concerning the monitoring and the evaluation of the social economy, there are analyzed two separate levels but also complementary: the first one by the international methods of getting the data by the statistical existent system, counting on the national accounts system and secondly by creating methodologies, instruments and guiding monitoring and evaluation elements that correspond to the received data but approach in a qualitative way the social aspects of the social economy field.

There are two essential problems in Romania for the efficient evaluation and monitoring of the social economy. The first one is the low power of the social economy institutions and the second one, the structure of the national accounts that stops the identification and registering of the companies' and organizations' activities from the social economy. There is also to be noticed the lack of a monitoring and evaluation methodology that are accepted internationally for the complete measuring of the social impact and of the good functioning of the social economy.

There are shown a series of suggestions counting on the study of more positive initiative examples at the international level, suggestions that count on the knowledge and the sociological and evaluation experience.

An important aspect of the study is the collecting of the most important pieces of information about the situation of the social area enterprises from the European countries and the description of the acts that have been made in these countries for the promoting of the social economy. From this point of view, having the common table of data that was established as significant orientation point, there are described eight of the best practices identified in Greece: the supporting structure for the social economy evolution in Crete-“KRI.K.O.S.”; the Institution for Supporting and Certification of the Social Enterprises; Facilitators in the urban area, the Industrial Cooperative from Dodekanissa isles and from other countries that belong to the European Union; The Art House/ The Artizans' Asociation; The Transport in the Ealing Community; The Cooperative for Training and Artizanal Services Estudio Gloria; Jupiter Foundation.

There is underlined the importance of the most common resource that is met inside the presented good practices-the social support-and they argument about the circular relation with the social economy, showing also some evolution orientations that support the potential of this form of social economy.

In each European country there are different practices of social economy. The companies and the organizations that belong to the field of social economy count on judicial and institutional situations that differ in each national European system.

There is presented a set of recommendations concerning the value of the registered experience, by underlining an integrated direction of going on with the efforts of evolving the social economy. There is underlined the social economy from the point of view of the European regulations as well as the links between the social economy and the policies of the European Union.

In conclusion, after a serious analysis about the social economy area there may be said that the social economy may contribute effectively to the social cohesion and could be one of the significant actors that fight against the social exclusion.

6.2. PRELIMINARY AND INTEGRATIVE IN SOCIAL ECONOMY

S. Cace, D. Arpinte, S. Cojocaru (2010), *Social Economy in Romania. Preliminary Approach*, Journal for Research and Social Intervention, vol. 31, pp. 64-79.

The article had the support of the CNCSIS, IDEI 226/2007 "Capacity of the Romanian institutions active in the field of social inclusion to absorb and manage structural funds" and the PROACTIVE project-from marginal to inclusive, financed by the Management Authority for the Sectoral Operational Programme for the Development of the Human Resources.

There can't be considered in Romania as being an evolution of the legislative area that is valid for the social economy, although in the context of the present economical crisis, the understanding and prizing of the social economy are crucial.

There is offered for the introduction part a general image as concerning the social economy field at the European level and at the national level too. Social economy became a subject that is discussed about in Romania in the last two years especially, the European structural funds playing a fundamental part in promoting the social economy and the financing of the social economy activities. There is made a short description of the present level of evolution of the social economy in Romania and in Europe. There are also presented its historical evolution, characteristics of the social economy beneficiaries, the support and encouraging financial mechanisms for the social economy as well as the ways of checking of their efficiency. There is analyzed the period of evolution for the social economy by the three forms of organization specifically for the social economy: cooperatives, non-governmental organizations and the mutual help homes. The possibility of evolving social economy activities at the level of the three

types of organizations is reduced, the same limited being also the availability of the public institutions for supporting the structures that refer to vulnerable groups. Except the NGOs the other types of organizations address indirectly to the disadvantaged groups without any kind of services supported with the purpose of their social reintegration. Among the three types of organizations, the cooperatives are the ones that register the lowest activity volume and also of the employees.

There is presented and enlarged the research methodology (pg. 66) used with the purpose of gathering the information in the regions from the South-Muntenia and South-West Oltenia, in the research made with the purpose of researching the social economy sector as concerning its capacity to contribute to the social inclusion of the disadvantaged groups as well as an analysis of the socio-economical context from the implementing regions. There is described the situation of the organizations from the field of the social economy at the national level, the present situation of the organizations from the social economy field in the South Muntenia and South West Oltenia regions, the non-governmental organizations, the mutual support homes. There are analyzed the immediate perspectives for the evolution of the social economy and there is examined the way in which the state institutions could offer support to the organizations from the field of the social economy.

The cooperatives are the ones that register the lowest activity volume and of the employees number. The effects of the economical crisis are to be felt in the case of all types of cooperatives. It is considered that there aren't real support forms and not even the intention to support the cooperatives' activity from the legal or institutional point of view.

ONGs are dependant on the external financing sources, meaning that they are exposed to the risks generated by the low number of financing opportunities. Comparing with the last years (before 2007) the number of financial groups reduced themselves, a situation that affects especially the small organisations.

There aren't direct support forms for the activities of the social economy but rather an indirect one and also partial. The authorities support indirectly the social economy by offering facilities for the disadvantaged or vulnerable groups but have a good potential in influencing the decisions with electing purposes. Most part of support are predicted by the specifically laws that check the activity of all kinds of entities from the field of the social economy and they have a reduced impact in the continuous evolution of the area.

The conclusions intend to synthesize the level of evolution and the situation of the three types of organizations concerning the economical activity in evolution starting from the

identified realities on the field as well as a series of predictions concerning the activities of the social economy for the next years.

S. Cace, D. Arpinte, C. Cace, S. Cojocaru (2011), *The social economy. An integrating approach*, Transilvanian Review of Administrative Sciences, No. 33 E/2011, pp. 49-66.

The article benefited of the project's support "Proactive- from marginal to inclusive", financed by the management authority for the Sectoral Operational Programme of Human Resources Development.

There is offered a general image concerning the social economy by a normative and integrative view over it, the social economy being created with the purpose of creating an alternative economical and social space for the disadvantaged and socially excluded groups. The subject of the social economy isn't talked about and recently analyzed, but it counts on historical practices evolved during many centuries.

There analyzed the involvements and the evolution of the social economy concept. The organizations (such as cooperatives) are most often mentioned as specifically forms for the social economy. After the analysis there are made a series of mentions accordingly that the social economy concept is a paradox both for the reader and the researcher, many times not being mentioned in the characteristic literature (Arpanet et al., 2010). The authors tend to find an explanation of the difference between the conceptual understanding of the social economy and the practice of the social economy, as well as an explanation about the low number of analysis concerning the subject of the social economy.

With the purpose of understanding the social economy as a theoretical and practical concept there are given the examples, analysis and works of some other authors that were concerned about the subject of the social economy and its involvement, works that talk about the defining of the social economy from many points of view (Fontana and Schrage, 2000; Clarence and Nona, 2007; Westland, 2003; Neat, 2009; Hill, 2002; Riesman, 1999; Bruin, 1977; Fluorite, 2009; Hunt, 2005; McCurry, 2002). The definitions of the social economy were supported by the ideological concepts of the actors that were involved in the debate. These debates concerning the defining of the social economy counts on an enlarged/large debate about the social economy and economy in general.

The majority of the presented authors proved that there are two types of definitions that are applied to the social economy: one of them refer to taxonomy (a list of judicial and institutional forms that may include the large defining of the concept), and the other one

refer to the normative analysis (mentions the fundamental values or the principles of the social economy). There are also to be noticed definitions that are a combination between the two. The significant characteristic of the social economy is its capacity to contribute to the enriching of the humans' life both by practical coordinated actions to satisfy the different needs of the concerned ones as well as by the enlarging of these needs beyond the limits of a certain organization, as a measurement for an economical behavior that counts of ethical principles.

There is analyzed the concept of social entrepreneurship, which is talked about more and more in Romania, but, in real terms, there are still little initiatives in this field, its evolution hardly being to the beginning. The concept gets recognition and value by the programmes initiated at a world wide level, by debating the subject in the conferences, in the books or in the university courses. The entrepreneurship's practice takes place inside an ecosystem that can intensify or lower the efficiency of the social entrepreneurs' activity. The enrichment of this kind of practice needs changes in the ecosystem.

There are presented the characteristics of the social economy in Romania, the organizations of the social economy and there is underlined the fact that there isn't any legal field characteristic to this but just some regulations that are considered to be insufficient for the promoting and the supporting of the social economy initiatives. The fields in which the social economy activation are: social protection, social services, for health, assurances, credits, agricultural production, education/training, culture, sports, activities for the free time.

There are described and analyzed the organizations' typologies for the social economy and the characteristics of these organizations/entities, talking on large about the legislative analysis of the actual level of each organization. These organizations are: NGOs, companies or organizations especially regulated (i.e. protected workshops), the mutual support homes (CARs), the credit cooperatives – popular banks, the consumption cooperatives, agricultural cooperatives societies, the working cooperatives societies. In the category of the cooperatives are also included a series of specialized cooperatives for the leaving places fields, fishing ones, woods and transport.

There is described the economical and social situation from Greece and there are presented in all the legislative and institutional aspects that characterize this country. According to the analysis, there is to be registered in Greece an insufficiency of the legislative and institutional area as well as the lack of the resources that stop the evolution of the social economy field. For the support and the maintenance of the mentioned ideas, but also for finding out more information concerning the evolution of the social economy area (Mitrosyli, 2007).

The social entrepreneurship is considered as being insufficiently evolved in present in Romania, the initiatives of this field being low. There is necessary the identification of the opportunities for enriching the social entrepreneurs' field by encouraging all the actors involved in finding the best solution for it to create opportunities.

A good promoting of the social entrepreneurship could be realized by creating a strong community to guide itself with the type of good practices and to realize the benefits that the social entrepreneurship could have in the future.

The creating of the social entrepreneurship's field need concentrated efforts from the community's part just to be able to assimilate the information and the good practice examples. There are in a direct link all the elements that could create a positive image about the social entrepreneurship and underlines the importance of creating a social support system for the entrepreneurs.

6.3. THE SUPPLY AND DEMAND OF SOCIAL ECONOMY: VULNERABLE GROUPS AND INSTITUTIONAL ANSWERS

S.M. Stanescu, S. Cace (coordinators) (2011). *Other type of occupation-the need of social economy in the evolution regions from Bucharest-Ilfov and South East, Expert, Bucharest.*

S. M. Stanescu, S. Cace, F. Alexandrescu (coordinators) (2011), *Between Opportunities and Risks: the social economy offer in the evolution regions from Bucharest-Ilfov and South East, Expert, Bucharest.*

The two papers were realized in the INTEGRAT project-*resources for the women and the Roma socially excluded groups*, co-financed from the Social European Fund between 2010-2013 by the Sectorial operational Programme the Evolution of the human resources 2007-2013 the priority axis 6 "The promoting of the social inclusion", the major field of intervention 6.1 "The evolution of the social economy". The general objective of the project is the active promoting of the social inclusion on the work market by activating the social economy, of the women and the Roma groups, by creating partnerships and the support of involvement in the community's life of the socially excluded persons from the evolution regions (RD) Bucharest-Ilfov and South-East.

The books were made by the research team of The Research Institute for Quality of Life as responsible partner for activity 2 “Study concerning the ES in RD Bucharest-Ilfov and South-East level of evolution”. The research took place in August 2010-May 2011.

There are presented a petition for social economy and the social economy offer from the authors’ point of view. By the social economy petition three is to be felt the need of a society’s population or of some social groups to use or to benefit by the offered activities by the social economy. The offer of social economy refers to the assembly of goods and services providing, available in a society at a certain moment that is offered by qualified providers. In Romania’s case, these providers are NGOs, CARs, credits cooperatives and cooperative societies.

Methodology

The social economy need	The social economy offer
<p>Quantitative methodology.</p> <p>Investigation on questionnaire.</p> <p>The representative samples for he adult populations from the two regions. Representative investigation at the level of the adult population from Romania just to compare the obtained results. The samples are three stages constructed, stratified initially on the size of the place concerned in the urban area or on the evolution level in the rural field and also on the regional criterion. The second level was stratified by voting sections and then by the adult population at the third level. The minimum number of questionnaires on the place was of 10 tables, and on voting section they were about five or ten questionnaires. The respondents were selected by means of the randomly road method adapted for each region area (urban or rural). The volume of the three</p>	<p>Quantitative methodology.</p> <p>Investigation on questionnaires: nongovernmental organizations (229), cooperative societies (235) and mutual support homes (228).</p> <p>The nongovernmental organizations were identified from the data base of MMFPS referring to the credited providers by the social services, completed with data from the data base FDSC.</p> <p>The mutual support houses that were included in the analyze were selected from the Romanian National Bank’s evidence.</p> <p>The cooperative societies were selected from the data bases of the unions of such kind of activities (as for example UCECOM and CENTROCOOP) and from the evidence of the Public Finances Ministry.</p>

<p>samples held 3620 respondents, selected from 584 voting sections from 178 places. The representative national sample held 1202 persons having an error level of about 2,8%. The gathered data were divided on age, sex and residency place according to the INS data since July 2010. Among the respondents there were also persons belonging to the vulnerable groups and either they do not have a place of work at the moment of the research or they are the beneficiaries of the social support.</p> <p>Qualitative methodology.</p> <p>The semi-structured interviews that checked the economic-financial situation from the perspective of the given support from the state and the perceptions concerning the prioritization of the support for the ones in need and the responsibility for these ones. The tables were filled by 570 respondents (37% from the total number) in the South East region and by 268 persons (23%) for Bucharest Ilfov. For the national sample, the tables were filled by 453 persons (38%.</p>	<p>They were applied for each entity of social economy three different instruments: a questionnaire destined to the organization (ONG, CAR, or cooperative society), another one for the manager or the organization's president and the third one to two employees of the organization.</p> <p>Qualitative methodology.</p> <p>Interviews or discussions focus group type, that took place in the places and districts from RD, Bucharest-Ilfov and South-East. The research ended by a number of 69 case studies in some the organizations from the two evolution regions.</p>
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The demand for social economy

The first part of our work is oriented towards the problem of the work force occupationally, drawing in the first chapters a vision about the effects of the unique European market extension in Romania from the economical and historical perspective. Also, the field of the European social policies is analyzed with the purpose of adapting the Romanian policies system to the European one. The analysis of the social public inclusion policies offers a perspective over the evolution way of the social economy. This

is why the study of the social inclusion policies concentrates on the evolution in time of the measurements and underlines the consequences over the debating policies of poverty and of preventing the social exclusion. The study of the social inclusion analyses the legislative field from the pre-accession period of Romania to the European Union keeping in mind two strategies for evolving the social inclusion meaning: the Lisbon Strategy since 2000 and the Europe Strategy 2020.

There are described aspects about the social entrepreneurship and about the occupationally of the vulnerable groups being defined an analysis of the social exclusion forms in comparison with the forms of social inclusion for the vulnerable persons on the work market. The social inclusion on the work force can be facilitated by the evolution of the social entrepreneurship.

There is analyzed the work market in the evolution regions from Bucharest-Ilfov and South-East. The study about the work market underlines aspects referring to the parting of the general characteristics of the Romanian work market and of the employees' profiles. Another aspect of the analyze refers to the integration behaviors on the work market of the vulnerable groups. There is made a conceptual analysis of the occupational and un-occupational level, of inactivity and vulnerability. Offering information about the active components on the work market and the process of continuous learning. Furthermore, there are drawn the vulnerable population's profiles present in the two evolution areas.

There is underlined the importance of the social economy as a resource and answer to the social needs of the vulnerable groups. The analyze presents in the beginning the regional characteristics and the living level being followed by the study of the offer and of the importance of the social economy entities. In addition to the offer's analysis for the social economy there is made a research of the need of social economy services and of the social actions that the population involve into. There are analyzed the vulnerable groups from the perspective of the social economy. There are presented and analyzed the regulations for the enriching the woman's positioning and the potential of the women's involvement inside the social economy entities. Then there is analyzed the social economy from the point of view of the Roma social integration, underlining its social value and its involvement over the Roma populations. The analysis takes care with the degree of knowledge about the social policies for the Roma, for the social economy in the Roma communities and of the social economy projects also for the Roma population. There is presented the international and national context concerning the difficulties of integration on the work market of the disabled persons and the social economy's potential to create a better life for this vulnerable category. There is also obtained the employers' perspective as concerning the employment of the disabled

persons. There is underlined the population's perception concerning the social disadvantaged categories that should be helped as a result of the study that used the national samples concerning the social economy need.

At the end of the work concerning the need of social economy, there are presented the results of the research and there are also made suggestions for creating an integrated strategy for promoting the employment by means of the social economy.

The social economy offer

The social economy offer is described by the perspective of the entities' representatives for the social economy with a special attention for the professional insertion of the vulnerable groups, especially the women, of the Roma population and of the disabled persons.

The work has five significant parts.

The first part of the book includes: the significant legislative regulations and the way in which the representatives of the social economy entities perceive the legislative and institutional field, the history of the legislative area concerning the organization and functioning of the social economy entities in Romania, analysis the perceptions of the ES entity's representatives as concerning the impact of some recent legislative changing's in the ES entities' activity, the suggestions of enriching the legislative area and the perception concerning the institutional building, the collaboration with some other ES entities as well as with the representatives of the public administration that have responsibilities in the field.

In the second part of the work are presented and analyzed:

- Social economy activities from the nongovernmental sector, a less studied subject in the already made studies for the ONGs from our country;
- The mutual support homes for the employees (CARs) are taken into consideration for their importance in supporting the employees' welfare both in the crisis periods, and in the economical relaxing periods too;
- The mutual support homes for the retired persons (CARs);
- The actualization of the social protection function of the members and communities and the evolution level of the economical activities.

The third part analysis the problem of the human resources involved in the activities of social economy. There is described the situation of the disabled persons but also a category of potential entrepreneurs and creators of public policies in the field of the social economy-the graduates from the Master programme for social economy from four university areas from the country (Bucharest, Cluj-Napoca, Oradea and Timisoara), of whose first promoting will start work beginning with 2012.

The fourth part of the work presents the typology of the social economy entities, offer theoretical and methodological guidelines for the defining and the enunciation of the functioning principles of the social economy. It also shows in large a series of the districtual profiles for the social economy and a few case studies on some representative entities for the social economy...

6.4. PERSONAL CONTRIBUTIONS

In this field there are to be noticed many personal contributions where there is underlined the part of the social economy in making the social inclusion bringing new epistemological elements in the study and appliance of acting methodologies optimum in the Romanian context as well as fundament solutions concerning the district's evolution. So, we have structured the significant contributions depending on the following three big directions found in the plan of the results of the publicized researches:

- Conceptual clarifications concerning the social economy in the European and national plan;
- The elaboration and appliance of innovative technologies in the research and evolution of the social economy sector;
- The fundament of the applicative acts for initiating the positive practices in the field of the social economy.

6.4.1. Conceptual clarifications concerning the social economy in the European and national level.

In the transversality of the publicized papers we have presented the aspects about the social economy's evolution, the theoretical and conceptual strategies for the social economy as well as the significant forms of social economy. Correlative, to bring the necessary arguments to support the hard concepts we have presented and analyzed the support and financing mechanisms of the social economy institutions, the beneficiaries

of the social economy, as well as the potential support measures as concerning the financial crisis. From this point of view, we underlined two types of definitions that are applied to the social economy: one refers to taxonomy (a list of judicial and institutional forms), and the other one refers to the normative analysis (predicts the fundamental values or the principles of the social economy). At a European contextual level and also national one, we have proved the differences between the conceptual understanding of the social economy and the practice of the social economy, arguing the explanation about the low number of analysis about the subject of the social economy. The beneficiaries of the different forms of the social economy activities are shelved in the large area of innovation and sustainable evolution in Europe, on many levels: systemic, inter-organizational, interpersonal and individual. By means of these constant steps of conceptual clearing of the social economy we have made a direct coordination with the extended context where we can find the socio-economical reform where the whole Europe is involved and to which Romania takes part in an active way by its specialized structures. In the contributive plan, there is to be noticed a systemic actualization of the present level of evolution of the social economy in Romania and Europe which holds in a convergent plan the assignment effort to the novelty elements in the scientifically plan and the acting in a competitive regime of the specific areas of intervention in the field.

6.4.2. The elaboration and appliance of innovative technologies in the research and evolution of the social economy sector. The significant contribution in this field refers to the complementary research methodologies for studying the supply and demand in the social economy field. The using of these methodologies offer an assembly image about the social economy by a normative and integrative approach, the social economy being created with the purpose of creating an alternative economical and social space for the disadvantaged and socially excluded groups. In Romania, in the context of the present financial crisis, the understanding and the value of the social economy potential from the dual and complementary perspective of the supply and demand, represent the absolute novelty points in the European plan, taking into account the used methodologies to make the regional profiles' analyze.

6.4.3. The fundament of the applicative acts for initiating the positive practices in the field of the social economy. By the actions taken we have made a framing as exact as possible of the social economy inside the European integration policies for social inclusion and we offered a series of examples for good practices in Greece and other states of the European Union. There are described the significant types

of social economy in Europe and a part of the good practices in a few European countries: Italy, Spain, France, Sweden, Great Britain, Finland and Poland. By the experiences, capacities and good practices transfer inside the nongovernmental organizations coming from socio-cultural contexts we have contributed substantially to the creation of the methods and to the creation of the social and economical evaluation study for creating places of work and of the entrepreneurship initiatives from the field of the social economy. Also, by geographically drawing the social economy counting on scientifically research methods as well as the defining and identification of the best practices in the field of the social economy, we have accentuated and underlined the importance of evaluation and monitoring of social economy structures.

7. Scientific and professional achievements

As a researcher I have participated in numerous research projects, qualitative as well as quantitative, in the areas of social inclusion, social services, active and passive employment measures and recently, social economy. I held positions of project manager and research coordinator on projects implemented with national and international financial support. I mention briefly National Council of Scientific Research for Higher Education, the National Agency for Roma, International Labour Organization, UNICEF, UNDP, World Bank and European Commission.

I coordinated more than fifteen internationally funded projects. As responsible for research management within these projects held throughout my career, I established and coordinated numerous research teams which contributed to interdisciplinary approaches.

Three of significant issues on which my professional career has focused are **social inclusion of vulnerable groups especially Roma population, evaluation of social programs and policies and social economy**. As a result, I have been involved in many national and international projects regarding the access of Roma population to services or labour market. Some of the most relevant projects in which I held the position of project manager: are *L@egal 2 -European investment for the future of the Roma from Romania* (financed through SOP HRD 2007-2013, 2010), *The situation of Roma in Moldova* (financed by UNDP, 2006-2007), *Employment policies for Roma* (financed by National Agency for Roma, 2006), *Public policies for Roma* (National Agency for Roma, 2006), *The access of Roma to health services* (financed by Open Society Institute, 2002-2004), *Human Development Report: Roma in Central and Eastern Europe* (UNDP, 2001-2002). Besides, I have been actively involved as independent expert in projects such as *Decade of Roma Inclusion* and *National Social Inclusion Plan for Roma* for National Agency for Roma.

I consider several research projects to be relevant for my independent academic pursuit within the area of social inclusion of roma population: *Human Development Report-Roma in East and Central Europe* (funded by UNDP Bratislava and ILO Budapest, 2001-2002), which resulted in a highly visible publication at an international level (The 2004 UNDP Awards for Human Development - Excellence in Policy Impact): Andrey Ivanov (coordinator) *Avoiding the Dependency Trap, A Regional Human Development Report*,

The Roma in Central and Eastern Europe (2002); Roma Access to Health Services, funded by Open Society Institute, New York (from 2002 until 2004). *One of the most visible publications I collaborated with is an analysis of the Roma situation in Romania in a post-communist society, within the transition period, available at international level in several worldwide libraries is: Roma population from Romania (2002, under the coordination of Catalin Zamfir).*

Ever since the 90's researchers in public policies have launched research programmes on the social and economic situation of Roma population. Support strategies have been developed as well as a large number of action programs in this respect. *Public Policies for Roma. Evolutions and Trends* (2006, co-author with M. Ionescu), *Evaluation of programs for Roma communities in Romania* (2006, coordinated together with G. Duminičă and M. Preda) and *The National Strategy for Improving Roma Conditions: Community Voice* (2009, coordinated together with A.M. Preoteasa and G. Duminičă) are the result of considerable efforts to review what has been done in the field of Roma population.

A very important component of my work is the **active involvement**. Participation in the projects mentioned above allowed me to acquire **extensive knowledge of the field of social inclusion of Roma** and at the same time, to offer **constant support to public authorities** and other stakeholders for implementation of changes in Roma communities. *The National Strategy for Improving Roma condition: the voice of community* (2009) was the first comprehensive evaluation of the National Strategy for Roma, coming after previous initiatives of the NGOs in the field who were able to achieve only a series of reports on sectoral areas of intervention. The evaluation report of the strategy had a high visibility in both academic and political environment. Significant conclusions were used in other studies and research reports (i.g. Amnesty International Annual Report 2011).

As mentioned above, **evaluation** is another key element of my professional activity. Beyond evaluation of funding for Roma communities, I held positions of researcher or coordinator of evaluation teams regarding pre-accession funds (for example ex-post evaluation of Human Resources Development Phare 2002 and European Social Funds). One of the projects I managed, with a significant evaluation component, is *Capacity of the Romanian institutions from social inclusion area to absorb and manage structural funds*, financed by The National Council for Scientific Research in Higher Education through IDEAS program and implemented by the Research Institute for Quality of Life between 2007 and 2010. As a result of all the assessments and the courses completed in the field, I have gained solid knowledge and skills in evaluation of social programs and policies and in the field of financing by EU funds. My experience in this field has resulted in a series of articles of which I mention: (1) Corina Cace, **Sorin Cace**, Victor Nicolăescu,

2011, *Absorption of the structural funds in Romania*, The Romanian Journal of Economic Forecasting, Volume 15 Issue 2 /2011, pp. 84-106 and (2) Corina Cace, Sorin Cace, Cristina Iova, Victor Nicolaescu, 2010, *Capacity of Phare and structural funds absorption: pre-accession versus post-accession*, Review of Research and Social Innovation, vol. 28, pp. 78-115.

Regarding the social economy, I coordinated and I am still coordinating part of the most important studies conducted in Romania. All these studies are placed within the international context and try to clarify the role of the social economy for the economic and social development of the modern societies. Together with researchers from different areas I published several papers which provide an integrated image of the social economy. Among the relevant papers are: Simona Stănescu, Sorin Cace, Filip Alexandrescu (coordinators) (2011). *Between opportunities and risks social economy offer in Bucharest-Ilfov and South-East regions of development*, Expert, Bucharest; Simona Stănescu, Sorin Cace (coordinators) (2011). *Another kind of occupation: demand of social offer in Bucharest-Ilfov and South-East regions of development*, Expert, Bucharest; Sorin Cace, Daniel Arpinte, Corina Cace, Stefan Cojocaru (2011). *The social economy. an integrating approach*, Transylvanian Review of Administrative Sciences; Daniel Arpinte, **Sorin Cace**, Stefan Cojocaru (2010). *Social economy in Romania. Preliminary approach*, Revista de cercetare si interventie sociala; **Sorin Cace**, Daniel Arpinte, Nicoleta Andreia Scoican-coordinators (2010). *Social economy in Romania. Two regional profiles*, Expert, Bucharest; **Sorin Cace**-coordinator (2010), Daniel Arpinte, Nicoleta Andreia Scoican, Harry Theotokatos, Eleftheria Koumalatsou. *Social economy in Europe*, Expert, Bucharest

Relevant projects in which I held the position of research coordinator

- *Integrat-Resources for socially excluded Women and Roma groups*. Financed through SOP HRD 2007-2013, implemented by Catalactica Association in partnership with Bolt International Consulting- L. Katsikaris- I. Parcharidis .O.E. (Greece) and the Research Institute for Quality of Life. Project leader (2010-2013);
- *L@egal 2-European investment for the future of the Roma from Romania*, financed through Sop HRD 2007-2013 and implemented by the Foundation Centre of Resources for the Roma Communities (CRCR) in partnership with the Association Centre for Resources and Formation in Social Professions (CRFPS) "PRO VOCATIE and the Research Institute for Quality of Life. Project leader, 2010;
- *Proactiv-from marginal to inclusive*, financed through SPO HRD, major intervention domain 6.1. Promoting social economy, implemented by Catalactica Association in

partnership with Aitoliki Development S.A. Local Organization Authority and The Research Institute for Quality of Life. Project leader (2009-2012);

- *Capacity of the Romanian institutions from social inclusion area to absorb and manage structural funds*, financed by National Council of Scientific Research for Higher Education through IDEAS program, implemented by the Research Institute for Quality of Life. Project leader (2007-2010);

- *The situation of Roma in Moldova*. Financed by UNDP. Project Manager (2006-2007).

- *Ex-post evaluation for HRD Phare 2002 in Romania*. Financed by European Training Foundation, European Commission. Project manager (2006-2007);

- *Evaluation of programs for Roma communities in Romania*. Financed by UNDP. Project Manager (2006);

- *Employment policies for Roma*. Financed by National Agency for Roma. Project Manager (2006);

- *The access of Roma to health services*. Financed by Open Society Institute. Project Manager (2002-2004).

The papers published during the past 10 years have been accepted by relevant journals from various fields: sociology, economy, social assistance, public administration.

Many of the published articles have an interdisciplinary character, revealing elements which are common to several scientific fields.

Over 20 of the books I published are in libraries with international: University of Pittsburgh, United States, 2. University of Chicago Library, United States, 3. Library of Congress, United States, 4. Indiana University, United States, 5. Columbia University in the City of New York, United States, 6. Stanford University Library, United States, 7. The British Library, St. Pancras, United Kingdom, 8. University of Cambridge, United Kingdom, 9. Universität Zürich, Switzerland, 10. Bavarian State Library (BSB), Germany.

The scientific papers that I published have been cited by 7 ISI- rated journals.

As a result of a research project regarding the development of services within the community, funded by the World Bank, and my constant concern for dissemination of research results and recommendation in order to provide active support to social actors, in 2001 I have founded *The Journal of Community Positive Practices*. The Journal is published quarterly per year since 2001. The Journal offers a high level scientific environment for the debate of contemporary social issues and publishing of original

scientific papers on social concepts and research. The Journal is publically available at the website: www.jppc.ro

From my interest to scientific knowledge production point of view, I am constantly **aiming at publishing articles in journals indexed in international databases**. Following this interest **I am also constantly encouraging young researchers to publish high quality papers**. Therefore, I am actively involved in this process through my current status **as a member of the Editorial Board of ISI Web of Science journal Review of Research and Social Intervention**. The journal, according to Thomson Reuters Journal Citation Reports, has an impact factor of 1.186 and has provided, since 2009, a large and significant number of social scientific studies. I believe that my work there, along with my effort to make my research **area visible through fundraising and peer-reviews within conferences**, make me one the public professionals in this field of activity.

Following these arguments, I consider my professional experience to provide a coherent overview of my autonomy and visibility in academia and a factual guarantee of my future knowledge production within my area of expertise, as well as of my ability to facilitate, manage, and sustain the efforts of other research colleagues. More widely, as a project leader, having those assets can enhance on a long term the impact and dissemination of researches on roma population, evaluation and social economy.

8. Plans for future development

My research plans for the future include various aspects related to social inclusion, focusing on the access of the vulnerable groups to labour insertion, with a special attention paid to social economy, and on the assessment of the impact of the implemented (under implementation) ESF co-financed social inclusion projects upon Roma communities.

Together with several other colleagues I prepared two complex projects which concern the two objectives mentioned earlier.

8.1. EMPLOYMENT AND SOCIAL ECONOMY

8.1.1. Context

Several trends can be identified within international literature regarding social economy area. Firstly, the increasing interest upon social economy. In the past 20 years, the interest for the social economy has substantially increased in European Union. In 2007, two million social economy organizations were covering 6% of the jobs in the European Union and the trend is for expanding the sector, particularly on this crisis time (EP, 2009). Based on the special traits of these organizations and the trend towards expanding their range of services and products, the present narrative on social economy claims that it has not only shown the ability to solve new social problems, but that it has also reconfigured its position as an institution capable of providing stable and sustainable development “by increasing the value of economic activities serving social needs, correcting labor market imbalances and, in short, deepening and strengthening economic democracy” (CIRIEC, 2007, 7).

The Social economy is a relatively new concept in Romania. However, as recent research shows (Arpinte et al, 2010), Romania has a considerable experience in most of the existing forms of social economy (co-operatives, mutual organizations) since the late 19th century. Other organizations, such as voluntary ones, NGOs are newer in social economy field. Recent research has focused on the description and analysis of a variety of social economy entities, rather than explore how to improve employment opportunities through these organizations. Therefore, one question that arises, given the

current challenges faced by social economy organizations under the current economic climate, is: which type of social economy organization would offer the best approach for achieving labor market inclusion of vulnerable groups and how to improve their efficiency?

8.1.2. Research objectives and methodology

General objectives

1. Identifying the forms of social economy which may increase the efficiency of labour market access for vulnerable groups;
2. Development, testing, validation, and dissemination of free to use services and toolkits regarding the labor market insertion of vulnerable persons through the social economy;
3. Contribution to the increase of knowledge regarding the social economy sector in Romania, and fostering national and international comparative research.

Specific objectives:

- 1.1 Statistical analysis based on secondary data and primary data collected through national survey, in depth interviews, experts discussions, focus groups.
- 1.2 Development of a monitoring and evaluation system concerning the efficiency of social economy organizations in the labor market insertion of vulnerable groups.
- 1.3. Identification of mechanisms that contribute to the development of community-based social economy organizations.
- 1.4. Assess how community solidarity and community values contribute through social innovation to the advancement of economic welfare.
- 2.1 Development of an on-line, interactive, access free, database regarding social economy organisations that provide jobs for vulnerable groups.
- 2.2 Development of a toolkit for Roma communities aimed at fostering Roma employment: providing solutions for facilitating labor market access, to be used by experts in Roma issues.
- 3.1 Increase the international competitiveness of Romanian researchers and presence of socio-economic studies authored by Romanians in the mainstream of international science

3.2. Increase the opportunity to value at European and International levels the recent trends and created opportunities for social economy areas by receiving and reviewing most interested studies of the experts in the reference fields

The three services we set out to develop are:

1. A Monitoring and Evaluation System for social economy organizations;
2. An online, access-free, interactive database regarding social economy organizations;
3. A toolkit for Roma communities aimed at fostering Roma employment:

Methodology

The research methodology includes the following components:

(1) Basic research, upon different types of entities of social economy in Romania and their stage of development. This stage includes national survey, in depth interviews and focus groups, workshops with experts in social economy domain.

(2) Experimental development that includes the construction of the following instruments: a system of evaluation and monitoring social economy entities, an on-line data base regarding social economy entities that provide jobs, a toolkit for Roma communities for promoting employment improvement.

8.1.3. Originality and added value of the project results at National, European and International level

The originality of the project stands in not being confined only to a descriptive analysis of the social economy sector, as in other similar recent projects, but in providing a constructive approach, applied to social developments needs

The theme is an original research because it is located mainly at community level and assesses the implications of social solidarity in the production of economic welfare, through social economy as an instrument.

One indirect objective of the project is to prepare Romanian development experts and social researchers to be able to generate and exploit fully the information on the social economy. In this context, several original elements of this project are obvious: making freely available a very rich source of data for further secondary analysis for the

identification of cultural, social, economic factors behind the changes in the social economy in Romania since the 1989 Revolution. A knowledge of causal mechanisms on the dynamics of the social economy will allow the identification of appropriate means of action in national and local policies.

The interdisciplinary character emphasizes the general theme of the project - social economy, for the study and benefit of which approaches come from sociology, social policy, economics, psychology, social work, and anthropology will make a contribution.

Added value of the project results at National, European and International level

Fostering the growth of the social economy sector in Romania with an emphasis on its link with social inclusion.

The social economy stands as an alternative model of entrepreneurship, with a more democratic decision making process, socially inclusive, and with a strong emphasis on social and community needs. The potential for raising the employment level, especially by bringing into the labor market people from vulnerable groups, less likely to be employed in a for-profit enterprise, has been recognized by the European Union as an important mechanism towards a more cohesive society and more competitive economy. With one of the lowest level of workforce employment in the social economy sector in Europe, there is obviously ample space for relative growth of the sector in the Romania economy. However, change does not come by itself. This project aims to make a practical contribution to fostering this change through the development of an innovative service for monitoring and evaluation of the social economy, with emphasis on its social inclusion function, as a tool for increasing the awareness of social economy organizations, supporting their development, enhancing management skills and promoting the setting up of new organizations.

Identification of the risks vulnerable groups, especially Roma, are dealing with on the labor market

After almost a decade of continuous economic expansion, Romania was hit particularly hard by an economic crisis, which has both foreign and domestic root causes. Therefore, in order to put forward sensible job creation solutions, one must identify the factors blocking labor market access for different segments of the labor market. In this respect, it is obvious that vulnerable groups, especially the Roma, feature distinct traits and pose peculiar challenges, which need a targeted analysis.

Contribution to policy evaluation and providing recommendations for improvement

In this moment of crisis, it is important to reassess the social policies concerning vulnerable groups, employment, and the social economy. It is important not just to identify good policy options, but also the unsuccessful ones. Especially for social economy development and social inclusion policies, research internship abroad focused on three countries with significant results in terms of social economy, such as Italy, Greece and Belgium, would bring benefits in benchmarks and experiences that could be transferred to Romania. In addition, attention must be given not just for old problems, but to new or emerging ones as well.

Contribution to a better functioning of the labor market by reducing the information gap between labor demand and supply

One major source of an imbalanced functioning of the labour market is information asymmetry. The data collected regarding the social economy organizations for the Monitoring and Evaluation System will be used to set up an innovative interactive database, which would provide useful information about those social economy organizations *that provide job opportunities for vulnerable groups*. Thus free access information would become available to the benefit of those looking for or offering employment in the social economy.

Building community development capabilities via local experts

The general overview both from the Roma and the authorities seem to point to the necessity of rethinking the philosophy of labor market inclusion programs. The most important identified points of intervention are *education* and *the relationship with the employer*. Since the explanation for the employment status of the most vulnerable Roma is based on the trap of lack of education and skills, future initiatives will have to place this at their onset. We intend to put forward action recommendations for local initiatives aimed at fostering Roma participation on the labor market that could be carried out by experts on Roma issues concerning the following issues: employability, social exclusion, and support schemes. These recommendations, based on a review of good practices for Roma community development, would take the form of a Toolkit for fostering Roma employment, to be used by local experts in Roma issues.

8.1.4. Expected results and dissemination

The **project results** are expected to support the growth of employment of vulnerable groups through several services: a monitoring system of social economy organization, an online data base with social economy organizations that provide jobs for vulnerable persons, and a toolkit for Roma communities in order to stimulate employment.

The findings of the research will be valuable in enabling governments and other agencies to develop policies to provide the institutional structure that will enable citizens to act to secure their welfare as well as contributing to our understanding of the dynamic relationship between the institutional structure of society and subjective experience of quality of life.

The findings will be disseminated to relevant national and international stakeholders and published in mainstream international peer review journals. There will be a project web site which will enable the publication of findings as they become available

1) dissemination of the scientific output, in Romania and abroad, for a better knowledge of the social economy outlook in Romania, based on a internationally competitive research. In addition to the project website, there will be: international conference in Romania; briefing papers for the governments, international agencies and civil society; presentations at national and international conferences; working papers; articles for international peer review journals; edited books, published in a major foreign language at a prestigious Western publishing house.

2) dissemination of the innovative services developed in this project, contributing to the development of the social economy sector and fostering social inclusion.

The three services-Monitoring and Evaluation System for social economy organizations, database of social economy organizations that provide job opportunities for vulnerable groups, and Toolkit for Roma communities aimed at fostering Roma employment – will be made available via the Internet and in print to a variety of beneficiaries: social economy organizations, people looking for employment in the social economy, community leaders and organizers, social work professionals, social policy experts, local and central authorities and policy makers.

8.2 ROMA POPULATION AND EUROPEAN STRUCTURAL FUNDS

8.2.1. Context

Roma inclusion policies have been subject of public debate for last 20 years, but recent reports show the progress in this area is rather slow in Romania. Most of the funds used for implementing projects for Roma communities come from European Social Foundation (ESF). There is a gap between policy makers' agenda for Roma development and areas for action relevant for the supported Roma communities. Within this context, the general objective of the current project is the assessment of impact of implemented

(or under implementation) ESF social inclusion projects upon Roma communities. We aim at doing this by identifying those elements which are not obvious when correlating this gap between agendas with the situation of Roma. We focus on secondary analysis of social indicators from national and international reports and databases, on the assessment of European Union funds and of ESF social inclusion projects for 2000-2014 period, as well as suggesting policy proposals for Roma projects funding. The methodology of the project consists of quantitative as well as qualitative methodology. We use a bottom-up approach, complementary to the top-down one, which was the basis for defining areas of funding for Roma during 2007-2013. This approach provides a greater accuracy in determining community needs and impact, in order to establish the relevance of future interventions for Roma.

The importance of current project take into account several separate directions: it will be an important argument for developing a new strategy for funding similar projects, its results being available for ESF for a more adequate allocation of funds for the future period of 2014-2020 and it would be a useful tool for developing new methodologies for intermediary evaluation of the ESF projects or other similar funding schemas.

8.2.2. Research objectives and methodology

General objective: Assessment of impact of implemented (under implementation) ESF social inclusion projects upon Roma communities

Specific Objectives include several levels of analysis:

1. Achievement of a secondary data analysis upon still unsolved social inclusion problems, in Roma communities;
2. Achievement of a meta-analysis of ex-post evaluations of pre-accession to EU Funds for 2000-2007 period of time in order to evaluate;
3. Assessment of ESF social inclusion projects for 2007-2014 implementation period of time, in order to evaluate;
4. Proposals of policies regarding financing Roma projects, as a result of 1-3. analysis;
5. Construction of a database regarding Roma projects and results of our analyses.

Methodology includes quantitative and qualitative approaches as follows:

1. *First phase:* Desk research: analysis of social indicators, national and international reports and secondary data bases on three of the objectives: Roma inclusion needs, pre-accession to EU funds addressed Roma and FSE funds addressed Roma
2. *Second Phase:* Meta-analysis of ex-post evaluations of pre-accession to EU Funds for 2000-2007
3. *Third Phase:* Collection of data by quantitative methods by using questionnaires. The units that will be investigated are: Roma communities in which ESF projects funding were /are implemented. The selection of communities will include several criteria: representative number of total communities implementing projects, types of Roma, types of project, regional/residential areas; Organizations that implement(ed) ESF projects for Roma on several criteria: representative number, types of organizations, types of project, regional/residential areas
4. *Fourth Phase:* Collection of data by qualitative methods: Local authorities, local Roma leaders, Roma population included in the projects from Roma communities in which ESF projects funding were /are implemented; Leaders from organizations that implement(ed) ESF projects for Roma; Managerial authorities for implementation of ESF Roma projects; Roma representatives from regional/central areas. Collection of quantitative and qualitative data will provide valuable information in order to achieve evaluations, mentioned in chapter: project objectives.
5. *Fifth Stage:* Construction of a data base regarding Roma projects that will be available on line.

8.2.3. Originality and added value of the project results at National, European and International level

The elements of originality and innovation that the implementation of the objectives bring to the field .The project proposes a Bottom-Up approach, complementary to official Top-Down one, which was the basis for defining areas of funding for Roma during 2007-2013. Advantage of these set of objectives is that provides accuracy in determining community needs and impact, in order to set the relevance of future interventions for Roma. The innovative aspect of the methodology is mainly based on data collection from a representative number of Roma communities in which projects ESF funding were/are implemented.

Also, proposed objectives will use for the first time lessons learnt of ESF projects under implementation or completed in terms of relevance and potential impact for the Roma

population. No other research project in Romania did address this issue. The most common way, problem analysis and previous researches emphasized the absorption and contracting of funds, *and not the way resources are spent for proper achievement of Roma needs. Our objectives set this analysis, going in Roma communities to evaluate social objective indicators, as well as perceptions and social relations.*

8.2.4. Expected results and dissemination

(1) the potential of influence the scientific field by new concepts or approaches: On scientific level, the project will create rethinking of definition of Roma population needs for social inclusion in area of funds programming by adding a more local perspective (from the beneficiary groups); this approach would change the theoretical and methodological establishments of how Roma population needs are assessed. Also the project will be a strong methodological foundation for an institutional analysis of funding regulations as well as of implementation of the targeted projects (problems and barriers concerning communication and cooperation of local authorities with the beneficiaries).

(2) the potential of significantly influence the scientific field by new concepts or approaches. The project is strategically important since it directly addresses decision-makers to develop future areas of intervention aimed at social inclusion of Roma:

- Provides an integrated approach to the means of intervention in Roma communities, especially projects with European funding. The aspect of data collection in community as research methodology is central to the impact assessment in supporting communities.
- Assesses the impact of the interventions financed by Structural Funds (ESF) to final beneficiaries and inside organizations managing EU funds
- Identifies the factors of success / failure regarding Roma communities and the significant weaknesses in managing projects for Roma communities in order to improve future project implementation
- Proposes future strategic directions and specific areas to future projects for Roma.

Research results will be promoted at level of relevant decision makers in order to help define areas of intervention for Roma social inclusion, for future financial planning. The research team will provide direct support for such planning intervention areas and provide evidence to sustain directions (policy proposal, available database). *The research is particularly relevant as it notes the lack of public debate or analysis on what directions and how effective Roma EU funds are used, the most frequently debates only analyzing the amount of*

resources that Romania manages to attract. Beyond managerial shortcomings that affect the degree of contraction or absorption of EU funds, we believe that an important element is whether these resources generate positive impact on beneficiaries. From this perspective, the proposed research has a significant contribution by concrete recommendations.

Analysis of relevant documents that substantiated interventions in social inclusion for 2007-2012 period (e.g. the National Development Plan, National Strategic Reference Framework, SOP HRD) indicate major deficiencies in strategic management that directly reflect in proposed for funding areas. The importance of research is also given by the lack of a similar approach that would provide relevant data for planning 2014-2020 financial programs in Roma area. Although the end of the first financial programming approaches, decision makers have not yet started planning activities for financial allocation of 2014-2020. Lack of information may lead to the stage that whole future process may be completed in a manner similar as planning for the year 2007-2013, with major deficiencies in identifying areas of intervention for vulnerable groups

The findings will be disseminated to relevant national and international stakeholders and published in mainstream international peer review journals. Specifically there will be: dissemination conferences; briefing papers for the government, international agencies and civil society; presentations at national and international conferences; working papers; articles for peer review journals; edited book, published in the Romania and Western Europe.

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