

Ciaian, Pavel; Kancs, D'Artis

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Causes of the social and economic marginalisation: The role of social mobility barriers for Roma

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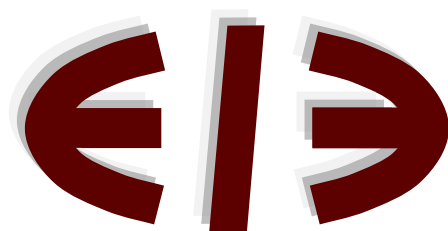
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EERI
Economics and Econometrics Research Institute
Avenue de Beaulieu
1160 Brussels
Belgium

Tel: +322 298 8491
Fax: +322 298 8490
www.eeri.eu

Causes of the Social and Economic Marginalisation: The Role of Social Mobility Barriers for Roma[☆]

Pavel Ciaian^a, d'Artis Kancs^{a,*}

^a*European Commission, DG Joint Research Centre, Ispra, Italy*

Abstract

The present paper studies the causes of the social and economic marginalisation, in particular, the role of social mobility barriers for Roma. We have identified two types of social mobility barriers for Roma: the cost of exit from the traditional Roma community and the cost of entry into the mainstream society. The existing policy and academic debate on the social mobility of Roma has been focused almost entirely on entry barriers, whereas exit barriers have been acknowledged and studied to a much lesser extent. In this study we advocate that from a policy perspective it is important to understand differences between the two types of social mobility barriers, as they have different causes and hence have to be addressed by different policy instruments. However, it is important that both types of social mobility barriers are addressed simultaneously, as they interact and reinforce each other mutually. Further, addressing the social mobility barriers of Roma requires a change in both formal and informal institutions. Therefore, policy measures have to be implemented and sustained over a long period of time in order to have a sustainable impact on the social and economic integration of Roma.

Keywords: Roma, informal institutions, self-enforcing institution, discrimination, self-isolation, social and economic marginalisation, exit/entry barriers, social mobility.
JEL code: O17, O43, I32.

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*Corresponding author, Competence Centre on Modelling.

Email address: d'artis.kancs@ec.europa.eu (d'Artis Kancs)

1. Introduction

Around 12 to 15 million Roma live in Europe¹ and in almost all countries where Roma are present they are socially and economically marginalised from the mainstream society.² Being relegated to the fringe of society, Roma perform worse in almost all socio-economic spheres of life. Usually, Roma are found to have a lower income level, a higher poverty rate, a higher unemployment rate, they are less educated, face a higher incidence of undernourishment, have a lower life expectancy, a higher child mortality, less access to the drinking water, sanitation and electricity, etc. than the mainstream population (UNDP 2005; European Commission 2004, 2012a, 2012b, 2012c, 2012d).

The present paper attempts to understand the causes of the social and economic marginalisation of Roma in Europe, in particular, the role of social mobility barriers. We have identified two types of social mobility barriers for Roma: the cost of exit from the traditional Roma community and the cost of entry into the mainstream society. Most of the existing academic and policy debate on the social and economic marginalisation of Roma has been focused almost entirely on entry barriers.

Entry barriers determine at what cost the mainstream society is willing to share with Roma the socio-economic infrastructure and resources that it controls, such as, access to the children education, the labour market and the social infrastructure. The key entry barrier into the mainstream society for Roma is the anti-Roma discrimination expressed through negative attitudes by the mainstream population and anti-Roma policies being in place for centuries. There is a vast body of literature investigating and documenting the adverse effect of the anti-Roma discrimination on the Roma's socio-economic well-being (e.g. Fraser 1995; O'Higgins and Ivanov 2006; Crețan and Turnock 2009; Kézdi and Suranyi, 2009; Kertesi and Kézdi, 2011; Drydakis 2012; Cviklova 2015).

The exit barriers from the traditional Roma community and lifestyle have been

¹In the context of this paper Europe means EU-28 + acceding and candidate countries. The current candidate countries are Albania, Macedonia, Montenegro, Serbia and Turkey.

²The term "Roma" is used – similarly to other political documents of the European Parliament and the European Council – as an umbrella which includes groups of people who have more or less similar cultural characteristics. Generally, the name Roma is used both as a noun (plural: Roma) and as an adjective. It is also used by several international organisations and initiatives, such as the Roma Education Fund or the Decade of Roma Inclusion. In contrast, the United Nations, the US Library of Congress and other international associations use the term 'Romani' as an adjective and a noun as well ('Romanies' is the plural form). The name 'Gypsy' is typically used by non-Roma; it is a name created by outsiders and is derived from the misconception of Egyptian origin. The alternative local names such as Tsigane, Zigeuner or Cigany are also disliked by many Romanies because of negative connotations about lifestyle and image that are inaccurate for most of them (Kertesi and Kézdi 2011).

acknowledged and studied to a much lesser extent in the existing literature. In the present paper we show that Roma-specific informal institutions are crucial for understanding the importance of exit barriers for their social mobility. Roma are governed by informal institutions, which substitute formal state institutions to sustain a specific social order. The informal institutions of Roma include a set of rules (or law), called *Romaniya*, which govern the conduct of members of the Roma community. *Romaniya* contains a complex system of rules based on a superstitious belief system; it is self-sustaining; it contains an own-enforcement mechanism; and it defines a system of the societal organisation (Fraser 1995; Weyrauch 2001; Leeson 2013). In line with the theory of the endogenous institutional change (Greif and Laitin 2004), *Romaniya* belongs to self-enforcing institutions (Leeson 2013). The present paper argues that a number of *Romaniya*-specific rules reduce the social mobility of Roma, by causing self-isolation and imposing costs of exit from the traditional lifestyle.

Based on these findings, we advocate that, from a policy perspective, it is important to acknowledge and understand that the two types of social mobility barriers – the cost of exit from the traditional Roma community and the cost of entry into the mainstream society – have different causes and hence have to be addressed by different policy instruments. It is equally important that both types of social mobility barriers are addressed simultaneously, as they interact and reinforce each other mutually. However, any policy action targeted to address the two social mobility barriers needs to take into account local conditions, as their relative importance varies strongly among communities, regions and countries. As regards the policy measures' effectiveness in reducing the two types of social mobility barriers, they need to be implemented and maintained over a long period of time to generate strong enough signals necessary to induce institutional changes in the attitudes and expectations of both Roma and non-Roma. Any short-term policy attempts without addressing the underlying institutional framework will fail to change the current status quo of the social and economic marginalisation of Roma.

This paper is organised as follows. The next section provides a brief history of Roma in Europe, and summarises the socio-economic situation of Roma. Section 3 analyses the anti-Roma discrimination by the mainstream society, whereas section 4 investigates informal institutions and their impact on the socio-economic behaviour of Roma. Section 5 analyses the impact of the anti-Roma discrimination and the self-isolation of Roma on social mobility barriers: the cost of entry and the cost of exit, respectively, and provides general recommendations for designing Roma integration policies in Europe. The final

section concludes.

2. Roma in Europe: the historical background and the current situation

2.1. Historical background

The Romani people, also referred to as Roma, Sinti, Sindhi, Kale or Romani, belong to an Indo-Aryan ethnic group.³ They are unique in sense that they do not identify themselves with a specific territory; they do not claim the right to a national sovereignty in any of the areas where they are settled. Historically, Roma had no homeland in Europe. Based on the linguistic and anthropological evidence, they originated in northwest regions of India and migrated to Europe sometime between the 6th and 14th century.

The Roma migration to Europe was gradual; it took place over several centuries. At the beginning, Roma resided in Persia, where they arrived in the 9th century. Roma have also spent a fairly long period of time in Armenia. After Turkish raids in Armenia, Roma moved to territories of the Byzantine Empire starting from the middle of the 11th century. Their subsequent move to Europe in the early 15th century was not a targeted migration either. Instead, it was a rather spontaneous movement determined by a number of demographic and political factors prevalent in that period. For example, in Balkans, where Roma arrived in the 14th century, the Roma migration took place in the time of a major upheaval for the Middle East and South-Balkans. In this period, the migration of the Roma population in Europe was primarily caused by the crisis of the Byzantine Empire, the Turkish invasion of the Balkans and the demographic growth of the Roma population. Their further migration into other parts of Europe was a long process; it was not associated with a mass exodus from the Balkan region. The majority of the Roma population remained in the region conquered by the Turkish Empire (i.e. Turkey and Balkans). By the start of the 16th century, Roma had reached all parts of the European continent from Spain up to England, Scandinavian countries and Russia (Fraser 1995; Achim 2004).

Since the Roma arrival in Europe they faced various discriminatory policies imposed by the mainstream population lasting for many centuries (see further). Although, the discriminatory policies varied between countries and over time – ranging from expulsion

³Note that throughout the paper we refer to Roma in general. However, there are important differences between Roma communities located in different parts of Europe. Due historical differences in the institutional environment (both formal and informal institutions) and in the structure of economies, there are important differences between Roma communities in the CEE, in the Balkans, in the Western Europe, and in the Northern Europe.

measures, forced assimilation up to enslavement in several parts of Europe – overall they have led to a social and economic marginalisation of Roma. One of the worst records in the European history of Roma occurred during the World War II, when Roma were subject to deportations and mass executions, similar to Jews. Only after the World War II the attitudes of state authorities towards Roma started to change, when the minority integration became one of the main European policy paradigms to address problems associated with the social and economic marginalisation of Roma. However, even in presence of the improved policy framework applied towards Roma during the last decades, the anti-Roma discrimination largely remains in place in all social and economic spheres (Fraser 1995; Barany, 2002; Guy, 2001; Hancock, 2002; Ringold, Orenstein and Wilkens 2005; Kemeny, 2006; Holocaust Encyclopaedia, 2016).

An important development in the last half of century that has led to heightened policy developments and a discriminatory behaviour of the mainstream population toward Roma was Roma migration from Central and Eastern European countries to the Western Europe. Europe was subject to two major East-West migration waves (Kancs and Kielyte 2010). The first migration wave started in 1960-70s from the former Yugoslavia as a response to the liberalisation of the visa policy by the Yugoslav government and due to a growing demand of foreign manual workers in Western European countries (Marushiakova and Popov 2010; Karoly 2015). The second East-West migration of Roma started in the 1990s after the collapse of the communist regime in Central and Eastern European countries. This migration was larger in the magnitude, as it affected more sending countries as well as it resulted in a stronger discriminatory policy response in countries where Roma arrived (Slavkova 2008; Marushiakova and Popov 2010; Karoly 2015). The main reason for the westward migration was better labour market opportunities than those available in the Central and Eastern Europe (CEE). Other important drivers of Roma migration were disparate social conditions and stronger discriminatory pressures in CEE countries than in Western European countries.

Nowadays, Roma are one of the largest ethnic minorities in Europe and in the same time it is among the most vulnerable and marginalised. Although, the exact size of the Roma population is notoriously hard to assess, because statistical data by the ethnic origin are not collected in an accurate and systematic way (mostly due to privacy reasons), Roma are present in all countries of Europe with a total population of approximately 15-20 million (Barany, 2002, O'Higgins and Ivanov, 2006; Milcher, 2006; Council of Europe 2012; Ringold et al., 2005). Despite the two recent East-West migration waves, nearly

80 percent of Roma in Europe still live in the former communist countries in the CEE. According to the Council of Europe (2012) estimates, the largest Roma populations are in Bulgaria, Hungary, Macedonia, Romania, Serbia and Slovakia. The percentage of Roma in the total population is close to 10% in Bulgaria and Macedonia, between 7% and 9% in Hungary, Romania, Serbia and Slovakia, and between 2% and 4% in Albania, Montenegro and Kosovo. Other countries with sizable Roma population include the Czech Republic, Greece, Spain, Ireland and France (see Figure 1).

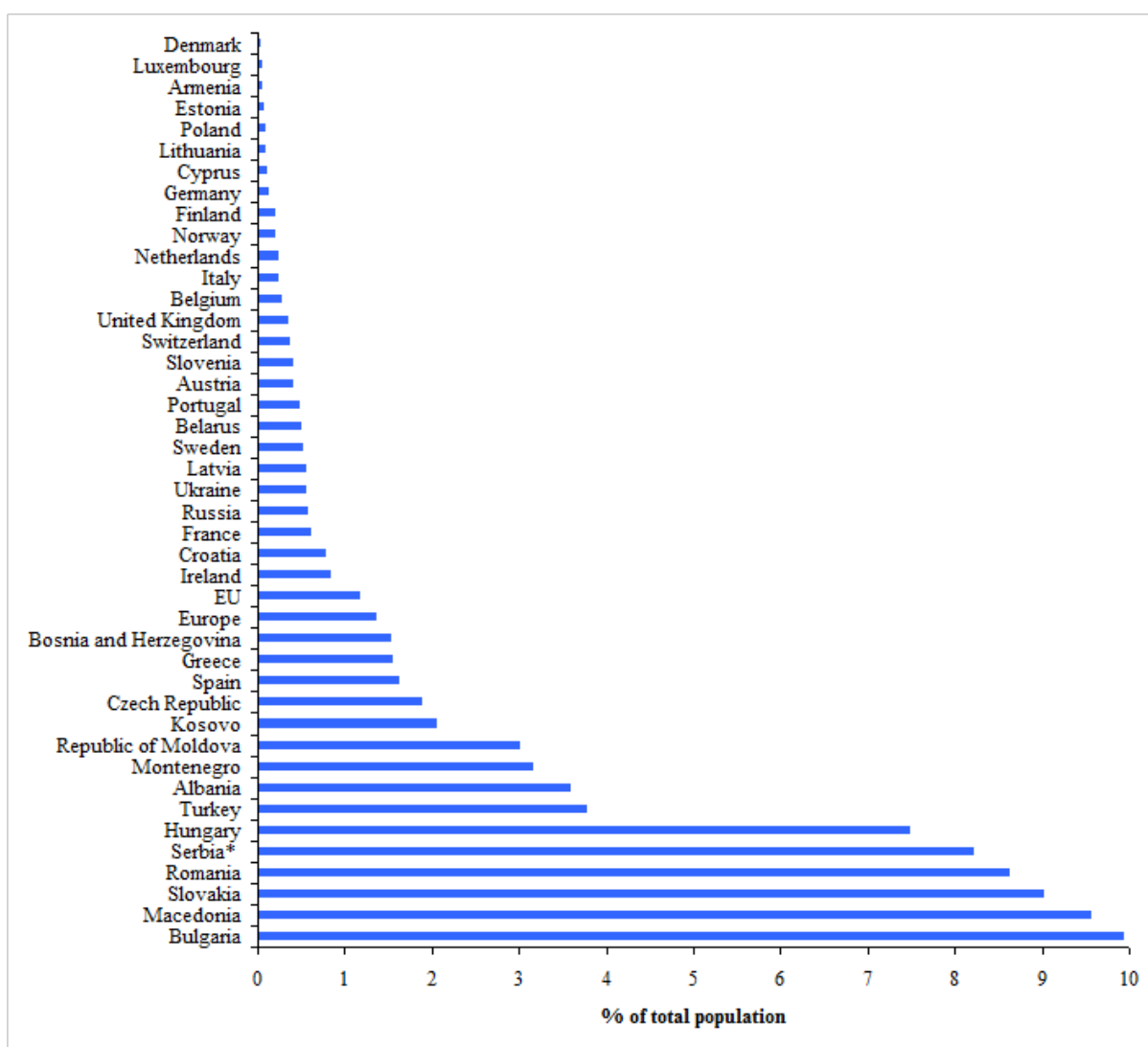


Figure 1: Roma population in Europe (% in total population). Source: Council of Europe (2012).

Despite their negligible share in the total population, Roma is one of the fastest growing population groups in Europe, with an increasing share of the Roma population

being comprised of youth: 36% are under 15 compared to 16% of the overall population in Europe. The average age is 25 years among Roma, compared to around 40 years in Europe (Fundación Secretariado Gitano, 2009; Roma Education Fund, 2004). Particularly in the CEE, Roma represent a significant and growing share of the school age population and therefore the future workforce.

2.2. Socio-economic situation of Roma in Europe

In almost all countries where Roma reside their standard of living is lower than that of the mainstream population. The social and economic marginalisation of Roma is widespread in Europe and takes various forms, it encompasses almost all aspects of the life spanning from the educational, economic (e.g. labour market, income) to the social (e.g. housing, health) infrastructure (e.g. O'Higgins and Ivanov 2006; Crețan and Turnock 2009; Kézdi and Suranyi, 2009; Kertesi and Kézdi, 2011; Drydakis 2012; Cviklova 2015).

Education problems of Roma are pervasive at all stages of the education system when compared to the rest of the mainstream society. The gap between Roma and non-Roma in accessing the education system already starts with the preschool education. The European Commission's 2011 survey conducted in 11 EU countries (EU-11) among Roma and non-Roma that share a similar environment reveals a significant gap in the preschool attendance between Roma and non-Roma in the surveyed EU countries. In contrast to 70%-97% of similar non-Roma, only 20% of Roma aged 6-15 in Greece, between 48% and 50% in the Czech Republic, Portugal, Slovakia and Spain, and between 50% and 65% in Bulgaria, France, Italy and Romania had ever attended the preschool education. The only exceptions are Hungary and Poland, where the Roma preschool participation is more than 80%, though still lower than for a similar non-Roma population (Table 1). The very low preschool attendance indicates that Roma children may likely face difficulties to catch up with non-Roma at subsequent schooling stages (primary and secondary education) and thus represents an important cause of their premature school drop-out (European Commission 2012b, 2014b).

The European Commission's 2011 survey results show also important differences in the compulsory school attendance (at the age between 7 and 15) between Roma and non-Roma children: on average, 14% of the Roma children aged 7 to 15 are not attending the compulsory school education compared to 3% of similar non-Roma children (Figure 2). More than 10% of Roma children in the compulsory school age in Bulgaria, Greece, Romania, Bulgaria, France and Italy are identified as not attending the compulsory school education either because they are still in preschool, not yet in education, skipped the

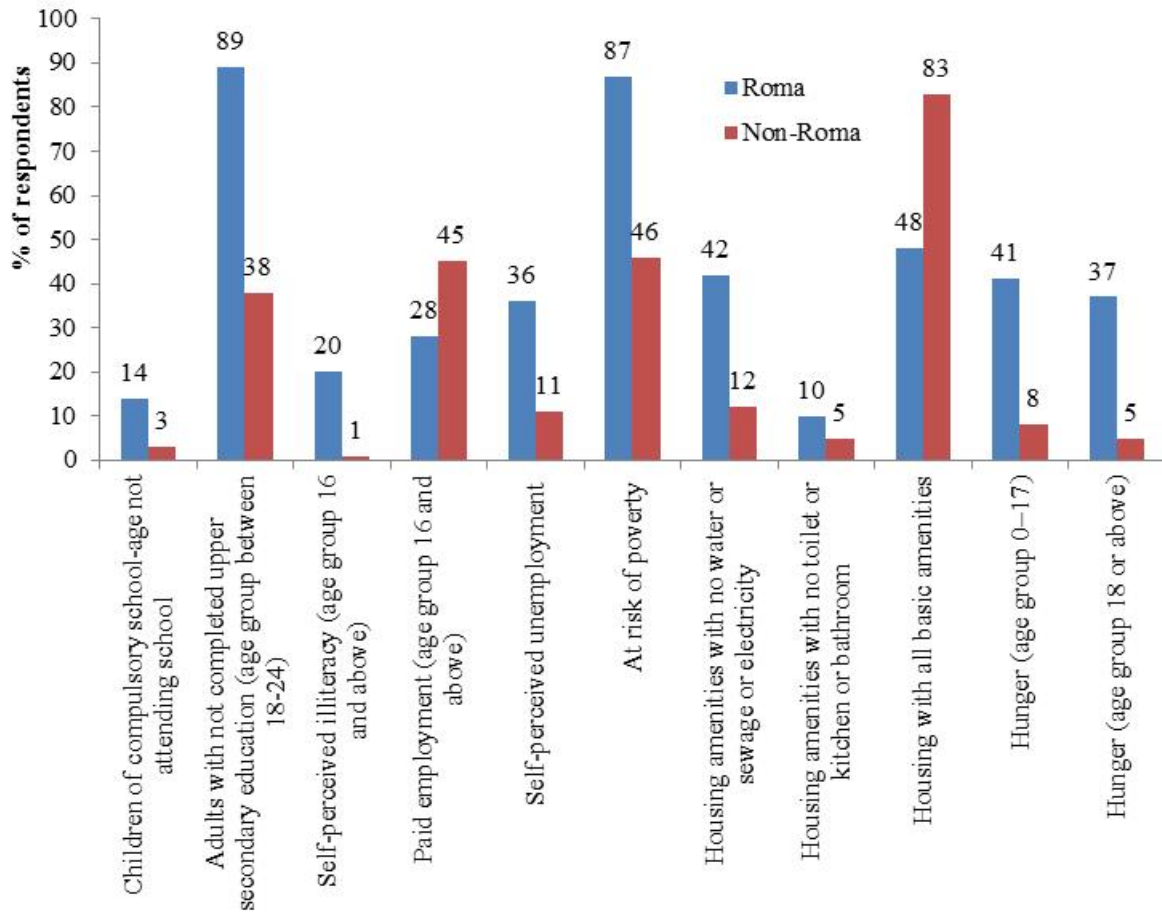


Figure 2: Socio-economic characteristics of Roma in selected EU Member States (% of respondents). Sources: Children with preschool education (age group 6-15); Children of compulsory school age not attending school in 2010/2011; Adults with not completed upper secondary education (age group between 18-24); Self perceived illiteracy (age group 16 and above): European Commission (2014d); Paid employment (age group 16 and above) (including full-time, part-time, ad-hoc jobs, self-employment): European Commission (2014b); Self-perceived unemployment: FRA (2011); At risk of poverty (below 60 % of the national median): European Commission (2014c); Housing amenities with no water or sewage or electricity; Housing amenities with no toilet or kitchen or bathroom in the house; Housing with all basic amenities; Hunger (at least one household member hungry at least once in the last month) : European Commission (2014d).

year, stopped school completely or are already working (Table 1) (European Commission 2012b, 2014b).

With respect to the upper secondary education, the European Commission's 2011 survey suggests that only a small share of Roma had completed the upper secondary education compared to non-Roma in the surveyed EU countries. On average, as much as 89% of Roma in the age group between 18 to 24 had not completed any upper secondary education compared to 38% of non-Roma. Further, the illiteracy rate of Roma aged 16

and above was 20% compared to 1% of non-Roma in the surveyed EU countries. The illiteracy rate is particularly high in Greece (52%), Portugal (35%), Romania (31%) and France (25%) (Figure 2, Table 1) (European Commission 2012b, 2014b).

Roma are significantly worse off on *labour markets* compared to non-Roma particularly in terms of employment opportunity and attained wage rate. According to the European Commission's 2011 survey, on average in EU-11 28% of Roma aged 15 and above were reported to be in paid employment (including full-time, part-time, ad hoc jobs, self employment) compared to 45% of non-Roma that share a similar environment. For example, in Portugal only 15% of the surveyed Roma were in paid employment compared to more than 43% of similar non-Roma population. The gap of 20% or more in paid employment between similar Roma and non-Roma is also observed in the Czech Republic, France, Italy, Poland and Slovakia (Figure 2, Table 1) (European Commission 2012d).

Even if Roma are in paid employment, they often rely on seasonal and occasional type jobs (Troc 2002; O'Higgins and Ivanov 2006). According to the European Commission's 2011 survey, only 47% of Roma in paid employment have full time jobs, while more than half of Roma in paid employment face precarious employment conditions: 23% hold ad hoc jobs, 21% are self-employed and 9% are employed part-time. This share varies between 88% in Italy to 18% in Hungary. In Greece, France, Romania, Portugal, Spain and Poland, 79%, 77%, 66%, 63%, 57%, and 56%, respectively, of those who are in paid employment do not have full time job (Table 1) (European Commission 2012d).

Regarding the unemployment rate, the European Commission's 2011 survey revealed that 36% of Roma were unemployed; which is three times higher compared to similar non-Roma. In Bulgaria, the Czech Republic, France, Italy and Slovakia, the Roma unemployment rate was between 3.5 to 6 times higher than for similar non-Roma (Figure 2, Table 1) (FRA 2011).

Based on the UNDP Roma survey results conducted in twelve Eastern European Countries in 2002 and 2004, O'Higgins and Ivanov (2006) find that most Roma suffered from long-term unemployment. While in the 2002 survey, more than half (51%) of unemployed Roma were without a job since 1996 or earlier, in the 2004 survey, the share of those without job since 1996 has increased to 64% (ranging from 55% in Bulgaria to 88% in Romania). The adverse effect of the long-term unemployment is reflected also in the fact that Roma are not eligible for unemployment benefits and must rely on a minimal social assistance.

Further, O'Higgins and Ivanov (2006) found that Roma unemployment rates decrease

	Education				Employment and income				Social infrastructure				Hunger***	
	Children with preschool education (age group 6-15)	Children of compulsory school-age not attending school	Adults with not completed upper secondary education (age group between 18-24)	Self-perceived illiteracy (age group 16 and above)	Paid employment (age group 16 and above)*	Self-perceived unemployment	At risk of poverty (below 60 % of the national median)	Housing amenities with no water or sewage or electricity	Housing amenities with no toilet or kitchen or bathroom in the house	Housing with all basic amenities **	Age group 0-17	Age group 18 or above		
Bulgaria	Roma 64	12	85	15	30	45	87	51	28	21	42	38		
	Non-Roma 94	0	32	1	41	13	49	17	21	62	5	5		
Czech R.	Roma 44	7	72	4	34	35	80	13	9	77	39	33		
	Non-Roma 93	2	25	0	60	9	47	2	3	95	9	8		
Greece	Roma 20	43	98	52	39	26	88	35	15	50	63	56		
	Non-Roma 90	3	25	1	40	12	49	1	0	99	9	4		
Spain	Roma 43	6	96	14	21	40	90	4	2	94	16	14		
	Non-Roma 71	0	76	3	33	21	67	4	3	93	6	5		
France	Roma 52	11	94	25	28	25	97	72	15	13	7	9		
	Non-Roma 95	0	23	0	49	5	28	2	2	97	2	1		
Hungary	Roma 92	5	82	6	29	33	81	56	4	40	36	38		
	Non-Roma 96	4	48	0	35	13	35	29	3	68	14	19		
Italy	Roma 62	13	84	17	35	31	97	36	10	53	49	52		
	Non-Roma 93	2	19	0	58	5	35	1	0	99	1	3		
Poland	Roma 80	7	82	14	25	34	81	7	15	78	38	36		
	Non-Roma 97	1	25	0	46	11	35	2	12	86	5	4		
Portugal	Roma 42	14	98	35	15	53	97	29	5	66	41	38		
	Non-Roma 82	4	66	8	43	17	67	3	2	95	9	7		
Romania	Roma 55	22	93	31	29	30	78	84	6	10	66	60		
	Non-Roma 87	6	50	2	38	10	35	52	10	38	19	12		
Slovakia	Roma 48	7	83	5	21	38	91	61	7	32	32	27		
	Non-Roma 88	5	7	0	53	7	44	18	2	80	3	2		
EU-11	Roma n.a.	14	89	20	28	36	87	42	10	48	41	37		
	Non-Roma n.a.	3	38	1	45	11	46	12	5	83	8	5		

Table 1: Socio-economic characteristics of Roma (% of respondents). Sources: Children with preschool education (age group 6-15); Children of compulsory school age not attending school in 2010/2011; Adults with not completed upper secondary education (age group between 18-24); Self perceived illiteracy (age group 16 and above); European Commission (2014d); Paid employment (age group 16 and above) (including full-time, part-time, ad-hoc jobs, self-employment); European Commission (2014b); Self-perceived unemployment: FRA (2011); At risk of poverty (below 60 % of the national median); European Commission (2014c); Housing amenities with no water or sewage or electricity; Housing amenities with no toilet or kitchen or bathroom in the house; Housing with all basic amenities; Hunger (at least one household member hungry at least once in the last month) : European Commission (2014d). Notes: ** including full-time, part-time, ad hoc-jobs, self-employment; ** Basic amenities include: water, sewage, electricity, toilet, kitchen, bathroom; *** at least one household member hungry at least once in the last month).

with the educational attainment level. However, survey results also show that unemployment rates among Roma fall much slower with the education level than among non-Roma living in close proximity to Roma. This discrepancy between Roma and non-Roma indicates presence of an anti-Roma discrimination on the labour market. According to O'Higgins and Ivanov (2006), this may explain why the early school leaving by Roma pupils is larger than for non-Roma, as the gains from education are considerably smaller for Roma. However, this may also indicate a lower quality education attained by Roma for the same grade, as they tend to attend lower quality schools and/or segregated classes.

According to the European Commission's 2011 survey, the large majority of Roma households (87%) have an income level below the national risk-of-poverty level (i.e. lower than 60% of the national median disposable income), compared to 46% of similar non-Roma households in the EU (Figure 2, Table 1). This latter figure represents a poverty risk significantly above the average rate of the EU population. The poverty risk is positively correlated with the household size, though the variation between household sizes is relatively small. On average, 72% of Roma one-person households, between 80% and 89% of multi-person households with up to 3 children and 94% of multi-person households with 4 or more children face the risk-of-poverty in the EU (European Commission 2014c).

Drydakis (2012) has identified a significant wage gap between Roma and non-Roma women in Athens (Greece) and only a relatively small share (34%) of this wage differential can be explained by observable characteristics (e.g. the human capital, age, the marital status), while the major part was attributable to the anti-Roma discrimination and prejudices against Roma women. Further, Drydakis (2012) finds that Roma women are segregated in low-paid jobs where they face the highest wage penalties. A similar result was found by Kertesi and Kézdi (2011) for Hungary in surveys conducted between 1993 and 2007: differences in observable characteristics (e.g. the educational background and geographic isolation) explained 40% of the wage gap between the employed Roma and non-Roma, whereas the rest of the wage gap has to be attributed to unobserved skills and the anti-Roma discrimination on the labour market.

Roma poverty is reflected in various aspects of their *social life* such as the housing quality, the health status and the access to food.⁴ The housing infrastructure of Roma lags significantly behind that of non-Roma. The European Commission's 2011 survey

⁴Note that in the present paper we focus on two socio-economic aspects: education and employment. Although, not explicitly discussed in this paper, issues related to health and housing are not less important.

revealed that 42% of Roma in Europe have either no running water, no sewage connection or no electricity in their home compared to 12% of similar non-Roma in the surveyed EU countries. Roma households with all basic amenities available in their home represent only 48% as compared to 83% of similar non-Roma households (Figure 2, Table 1). Roma also perform worse in terms of the health status, which limits their employment activities. This is particularly problematic for older Roma women. The majority of Roma women older than 50 years (61%) have health problems that limit their daily activities compared to 35% of non-Roma. Further, the high level of poverty is also reflected in a lower food sufficiency of Roma household members. For example, the childhood hunger rates are three or more times higher for Roma than for similar non-Roma (41% for Roma versus 8% for non-Roma), while for adults the hunger rate difference between Roma and similar non-Roma is by a factor greater than 7 (37% for Roma versus 5% for non-Roma) (Figure 2, Table 1) (European Commission 2012b, 2014c, 2014d).

3. Anti-Roma discrimination

3.1. Theoretical insights

In the existing literature, the anti-Roma discrimination is identified as one of the main causes of the social and economic marginalisation of Roma. The negative attitude against Roma among the mainstream population started to appear relatively soon after the Roma's arrival to Europe. According to Fraser (1995), sporadic signs of resistance and rejections began to emerge already few years after their arrival, though open conflicts usually become more widespread within 10 to 20 years. Over time, negative stereotypes about Roma gradually emerged among European societies. Roma became more and more associated with 'anti-social activities', such as the fortune telling, theft, lock-picking, purse-cutting, horse stealing, and general witchcraft and fraud (Fraser 1995). To illustrate the general perception of Roma in that period, their description in the Ephraim Chambers's (1728) *Cyclopædia* (an universal dictionary of arts and sciences) is particularly informative:

"[Roma], in our statutes, a counterfeit kind of rogues, who, being English or Welsh people, disguise themselves in uncouth habits, smearing their faces and bodies; and framing to themselves an unknown, canting language, wander up and down; and under pretence of telling fortunes, curing diseases, &c. abuse the common people, trick them of their money, and steal all that is not too hot, or too heavy for them." (Fraser 1995, p. 188).

Whereas there is a general agreement in the literature about the pervasiveness of the anti-Roma discrimination in the mainstream European society, there is no consensus in the existing literature about drivers behind the anti-Roma discrimination. A number of theories from different disciplines of social sciences have contributed to a better understanding of factors leading to a discriminatory behaviour: the taste-based discrimination theory, the statistical discrimination theory, the theory of social interactions and networks, the theory of the identity economics, the realistic conflict theory, and others.

According to the Becker's (1957) *taste-based discrimination theory* (or racial prejudice), a racial discrimination may arise when some individuals value certain types of individuals more than others (e.g. Roma versus non-Roma). Because of an implicit utility assigned to preferred individuals, they are treated more favourably in socio-economic interactions compared to other groups. Reversely, the disutility attached to a certain group of society would lead to a discriminatory treatment of this group in socio-economic interactions. Although, this theory helps to explain the occurrence of the transitory differential treatment of Roma by non-Roma, it provides too simplistic explanation of discrimination itself: the discrimination is triggered by disutility stemming from interactions with Roma without providing an explanation why the disutility arises in the first place. In a competitive market environment with rational (utility maximising) agents there is no scope for the taste-based racial discrimination, as competition would drive out discriminatory behaviour in the long-run (Arrow 1972).

There appears to be plenty of the empirical evidence supporting the taste-based discrimination theory. The negative stereotypes of Roma among the mainstream population can be observed at almost all levels of the European society; a racially motivated harassment of Roma by the mainstream population is common in many European countries (Mudde 2005; Ram 2014; Cviklova 2015). According to Mudde (2005), the surveys conducted in Bulgaria in 1992, 1994 and 1997 revealed that more than 85% of ethnic Bulgarians consider that "*Gypsies are inclined to commit crime*", more than 80% believe that "*Gypsies are lazy and irresponsible*" and more than 60% think that "*Roma should live separately and not mingle with us*". Bernát et al. (2012) report similar findings for Hungary, where the surveys conducted annually between 1994 and 2011 revealed that the mainstream society's discriminatory attitudes towards Roma have remained relatively constant over the last two decades. According to the 1994 survey results, 89% of Hungarian adult consider that "*the problems of the Gypsies would be solved if they finally started working*", 64% think that "*the inclination to criminality is in the blood of Gypsies*" and 46% agreed that "*it*

is only right that there are still pubs, clubs and discos where Gypsies are not let in". In the 2011 survey the percentage of respondents agreeing with these statements were 82%, 60% and 42%, respectively. The share of 'uncomfortable' respondents with their children having Roma schoolmates represented 34% at the EU level in the 2012 Eurobarometer survey. The highest 'uncomfortable' responses were in Slovakia and the Czech Republic, where more than half of all respondents feel uncomfortable if their children had Roma schoolmates. A relatively high proportion of 'uncomfortable' respondents were reported also in Luxembourg (49%), Italy (48%), Hungary (46%), Belgium (44%), Denmark and Cyprus (both 42%), France (41%), the Netherlands (38%), Bulgaria (35%) and Ireland (33%) (European Commission 2012a). According to the Roma survey conducted in 17 European countries by the European Commission, the UNDP and the World Bank, around half of the surveyed Roma have experienced at least some discrimination in the past 12 months because of their ethnic background (UNDP 2005; European Commission 2012b).

The modern economic theory has stressed the role of information imperfections and expectations in determining the agents' behaviour in socio-economic transactions (Arrow 1972; Phelps 1972). Building on these insights, the *statistical discrimination theory* argues that discrimination can arise when agents have limited information about characteristics of other individuals (e.g. skills). If the unobservable structural differences between society groups lead to a differential behaviour of different groups (e.g. differences in productivity), then agents have incentives to use observable characteristics (e.g. race) to differentiate between society groups (Arrow 1972; Phelps 1972). The statistical discrimination theory implies that, if Roma differ systematically in certain unobservable characteristics (e.g. culture) and behave differently in socio-economic interactions compared to non-Roma (e.g. productivity) then, based on the past experience, the mainstream population will use the observable characteristics of Roma (e.g. race) to differentiate them in socio-economic interactions from non-Roma (e.g. by offering them inferior jobs or lower wages).

The empirical evidence supporting the statistical discrimination theory can be observed e.g. on labour markets. According to Drydakis (2012), only a small share (34%) of the wage gap between employed Roma and non-Roma women can be explained by observable characteristics, while the major part is attributable to discrimination and prejudices against Roma. A similar result was found by Kertesi and Kézdi (2011), who estimate that up to 60% of the wage gap between the employed Roma and non-Roma could be attributed to the labour market discrimination in Hungary.

According to Arrow (1998), the racial discrimination of Roma cannot be explained by market-based theories alone. Instead, one needs to account also for *social interactions and networks*. Kranton and Minehart (1997) argue that a sufficiently dense network will mimic a perfect market, implying that the evidence of the statistical discrimination should be viewed as evidence that networks are both important and imperfect in sense that they are not sufficiently dense. Given that economic interactions are often mediated through personalised networks, various social aspects may shape the agents behaviour, such as the social capital, beliefs and preferences. Montgomery (1991) shows that in the case of labour markets, due to social network effects "*workers who are well connected might fare better than poorly connected workers*". A preferential treatment may occur, for example, when employers have imperfect information about potential employees (also referred to as the principal-agent problem, see Stiglitz, 1987). First, employers may have better information about employees with whom they share the same social background, such as language, ethnicity, or culture. Second, workers with the same social background as the employer may perform better than workers from other social groups.

The *theory of the identity economics* (Akerlof and Kranton, 2000) captures the idea that people make economic choices based on both monetary incentives and their identity (social psychology). The theory of the identity economics provides an explanation for the persistence of various social patterns including the ethnic-based discrimination. It combines the rational choice of (utility maximising) individuals with identity as an important source of the individual utility. It extends the cost-benefit calculation with a new set of payoffs for individuals' actions, which can either enhance the identity fulfilment or decrease the identity fulfilment. For example, if individuals strongly subscribe to idealisations associated with the ethnic group, then they will benefit from actions that express solidarity with the group, even when the undertaken action would lead to anti-solidarity with other ethnic groups. In line with this theory a number of empirical studies have argued that the ethnic difference between Roma and non-Roma in terms of language, the way of living (e.g. nomadism, norms), and the skin colour may have contributed to a negative Roma stereotype among the sedentary mainstream population (Hancock 1987; Petrova 2004; Uzunova 2010).

An alternative explanation for discrimination from the social psychology perspective provides the *realistic conflict theory* (Campbell 1965; Sherif 1966; Jackson 1993). According to the realistic conflict theory, when there are competing two or more society groups for limited resources, it usually leads to a social conflict and a discriminatory behaviour

between the conflicting groups. The social conflict in turn may trigger the emergence of negative prejudices and stereotypes against the competing group(s) as well as it can cause a hostile behaviour between the conflicting groups. This behaviour can arise especially in situations when one of the groups is perceived to be the winner in the competition for limited resources (i.e. if competition is perceived as a zero-sum game). The severity of inter-group frictions depends on the perceived value and the scarcity of resources (Jackson 1993; Sidanius and Pratto 1999; Whitley and Kite 2010).

Following this theory a number of economic activities of Roma (e.g. metal-working, trade) have become exposed to a direct competition with economic structures of the mainstream population at the time when they arrived to Europe. In the Central and Western European countries the crafts were tightly regulated in guilds; also trade and commerce was strictly controlled. Moreover peasants' economies were associated with a surplus labour and thus were not in the habit of employing a casual labour. These factors may have also contributed to the anti-Roma discrimination after their early arrival in the Central and Western Europe (Fraser 1995; Achim 2004). The mainstream society's attitude toward Roma was slightly different in the Eastern and Southern Europe, where often skills and services provided by Roma were in shortage, and thus Roma were more complementary for the economy and society. This may also explain why initially in the Eastern and Southern Europe Roma were more tolerated by the mainstream society or were enslaved to ensure the supply of specialised skills that could not be provided by non-Roma craftsmen (see further). However, with industrialisation, specialised crafts became more abundant, which eliminated the Roma's advantage and led to a gradual increase of anti-Roma attitudes in Eastern and Southern Europe (Fraser 1995; Achim 2004; Petrova 2004).

3.2. Institutionalisation of the anti-Roma discrimination in Europe

As early as in the second half of the 15th century, discriminatory attitudes against Roma started to become incorporated also in the public legislation and regulations in Europe; the anti-Roma discrimination became institutionalised as a response to the gradual deterioration of attitudes towards Roma by the mainstream population. The first type of anti-Roma measures which were applied, were either providing incentives for Roma to leave, or refusing permission to enter or stay in places where they arrived. For example, a common practice applied in different European towns and municipalities was to pay Roma to move on upon their arrival. These were the first institutionalised attempts to expulse Roma from the Central and Western Europe. Initially, most of these measures

were adopted at the local level (town, municipality) and they were heterogeneous across Europe. There were no targeted and coordinated policies enacted by state authorities (e.g. monarchs) at that time (Fraser 1995).

Gradually, however, state authorities step-up by adopting country-wide discriminatory policies against Roma across Europe in the second half of the 15th century and in the first half of the 16th century. One of the first anti-Roma regulations were adopted in Switzerland in 1471, the Holy Roman Empire adopted the first anti-Roma regulation in 1497, Castile and Aragon (Spain) in 1499, Sweden in 1523, England in 1530, Moravia in 1538, France in 1539, Bohemia in 1541, Poland in 1557. Most of these measures were based on racial grounds; state authorities perceived Roma as criminals and attempted to forbid them from entering, passing, or staying in the country (Fraser 1995).

In praxis, however, it turned out that initial expulsion measures adopted in the Central and Western Europe were rather ineffective in stopping Roma from arriving. The main reason was a poor enforcement efficiency of anti-Roma regulations, among others, due to limited available public resources and ineffective public institutions implementing them. Therefore, anti-Roma regulations were adjusted and strengthened between 16th and 18th centuries. Both the number of anti-Roma regulations increased and penalties became harsher. Laws were targeted either specifically on Roma or they were bundled with vagabonds, beggars and vagrants. The upsurge of the anti-Roma response was relatively uniform across Central and Western European countries. Among others, they included banishment to enter and stay in countries, expulsion, deportation, imprisonment, forced labour, death penalty without trial on the grounds of being Roma, banishment of certain occupations (e.g. trade), confiscations of possessions, forceful taking of Roma children from families and placing them in non-Roma families, forced assimilation, integration and deportation to colonies (Fraser 1995).

The repressive enforcement of anti-Roma policies varied considerably between countries. Countries with the most repressive and successful policy in preventing Roma to arrive or stay were the Netherlands, Rhineland and Switzerland. In contrast, France was more liberal and attracted foreign Roma from neighbouring countries, where Roma policies were more repressive. As a result, by the middle of the 18th century, more than a quarter of Roma sentenced for hard labour (French galleys) had been born outside France (Fraser 1995).

In the second half of the 18th century, after the failure of expulsion measures, a number of governments (Habsburg Monarchy, Prussia, Spain) changed the Roma policy

radically and started to implement a more 'rational' approach. For example, the Habsburg Monarchy adopted a series of measures in 1758-1783 aimed at immobilising and assimilating Roma. Another country implementing the forced integration was Hungary (which also included Slovakia) driven by the fact that Hungary was severely depopulated during the military conflict between Habsburg and Turks. Also in Spain both the Roma expulsion and assimilation policies were applied subsequently. In 1619 a decree was adopted ordering Roma to leave the Spanish Kingdom and any return was subject to a death penalty, the decree allowed Roma to stay in the Spanish Kingdom only if they settle and abandon the Roma way of life (e.g. the dress, nomadism, name, language). A subsequent regulation issued in 1633 (*prematía*) launched measures aiming at a forced integration of Roma within the mainstream population and it set the course of Roma policies in Spain for the next two centuries (Fraser 1995).⁵

A different development with respect to Roma occurred in the Eastern and Southern Europe, where expulsion policies were weaker or not present. In general, Roma were treated better by state authorities in territories occupied by the Ottoman Empire; they were not subject to repressive policies, as implemented in the Central and Western Europe, although, a negative stereotype and resentment were present also in the Southern Europe. In some regions Roma were enslaved from their early arrival in Europe. For example, in Romanian principalities (Walachia, Moldova and Transylvania) Roma were owned either by the Romanian state, boyars or monasteries. Roma slave were a personal property of its owner (master) and could be used as labour, sold, exchanged for other goods, used as a payment for debt or mortgage or bequeathed. In Romania slavery lasted until 1864 (Fraser 1995; Achim 2004; Petrova 2004).

The anti-Roma attitudes established in the first three centuries after the Roma arrival to Europe prevailed largely unaltered until the World War II. A forced assimilation policy gradually became more widely accepted to tackle the Roma issue by attempting to eradicate their way of life and pursuing them to adopt a sedentary lifestyle. This approach was supported by a wider public dealing with Roma including religious and charitable organisations. A particularly strong implication for the growing anti-Roma attitudes

⁵For example, the forced integration measures included: abandonment of Roma way of life (e.g. the dress, name, language); the Roma concentration in one places was allowed to no more than 200 inhabitants and in separate districts and the places (towns) where they were allowed to live were established by authorities; they were prohibited from keeping or using horses and from practicing occupation not connected with cultivation; they were forbidden attending fairs or markets; for travelling they needed permission; individuals protecting or helping them could be fined, hard labour (send to hard labour) (Fraser 1995).

in Western Europe had the renewed westward migration wave of Roma from Balkans and Hungary in the second half of the 19th century. As a response, different anti-Roma policies were reinforced in a number of Western European countries. Whereas forced assimilation policies became particularly targeted on the domestic Roma, foreign Roma were largely subject to expulsion. Internationally, there was an increasing cooperation among countries to tackle the Roma migration issue. For example, Germany co-operated with neighbouring countries to keep Roma away. Regulations on "*combating the Gypsy nuisance*" adopted by Prussia in 1906 included nine bilateral agreements with Austria-Hungary, Belgium, Denmark, France, Italy, Luxemburg, the Netherlands, Russia and Switzerland (Fraser 1995).

One of the worst records in the European racism against Roma occurred during the World War II. Similar to Jews, Roma were destined for extermination on racial grounds in occupied German territories (the Roma genocide is known as Porajmos). Porajmos was a genocide exercised during the World War II by the Nazi Germany and its allies to exterminate Roma of Europe. Under the rule of the Nazi government, a supplementary decree to the Nuremberg Laws was issued on 26 November 1935, defining Roma as "enemies of the race-based state", the same category as Jews. During this period, Roma communities suffered many human rights abuses, such as killings, abductions, torture, crimes of sexual violence, unlawful detentions, forcible displacement and plunder of property (Holocaust Encyclopedia, 2016). Historians estimate that 220,000 to 600,000 Roma were killed by Nazis and their collaborators, or around 25% of the 1 million Roma in Europe at the time. The biggest losses in Roma life were recorded in Yugoslavia, Romania, Poland, USSR and Hungary (Hancock, 2005; Holocaust Encyclopedia, 2016).

After the World War II, the attitudes of European state authorities started to change and shift towards the integration of Roma, by adopting a more integrated approach and the until then practiced anti-Roma discrimination was significantly deinstitutionalised. Generally, since 1970s, the integration marginalised society groups became one of the main European policy paradigms to address problems associated with ethnic minorities, such as Roma. Nowadays, integration policies in Europe seek to integrate Roma into the mainstream society, while retaining their cultural identity. Some of the key priorities of integration policies are to integrate Roma into the schooling system, labour markets and improve access to social services. The only exceptions were Communist countries, where a forced assimilation remained to be the main government policy paradigm. Only after the fall of the communist regime, Central and Eastern European countries started to

adopt a more integrated approach towards Roma based on the principles of equality and solidarity (Ringold, Orenstein and Wilkens 2005).

As documented in the strategic framework for European cooperation in education and training (European Commission 2012c), the European Union seeks to reduce the share of early school leavers to below 10% by 2020. Two recent political initiatives (and policy frameworks) highlight the importance of education for Roma inclusion: the Decade of Roma Inclusion (2005-2015), and the EU Framework for National Roma Integration Strategies (2011-2020). Both require Member States' governments to set up action plans and strategies for addressing the ethnic educational gap of Roma. In addition, the Paris Declaration⁶ aims to mobilise the education sector to prevent and tackle marginalisation, intolerance, racism and radicalisation, and to preserve a framework of equal opportunities for all, including inclusive education for all children, independent of social background.

The EU Framework for National Roma Integration Strategies was adopted in 2011, in order to accelerate the social and economic inclusion of Roma. According to the EU Framework, the EU Member States have elaborated National Roma Integration Strategies containing integrated sets of policy measures, which are annually assessed by the European Commission. With the new funding cycle 2014-2020, the EU Framework for National Roma Integration Strategies has an impact on the way the EU funding is allocated. Generally, EU funds target the specific needs of disadvantaged regions most affected by poverty and groups at the highest risk of social exclusion, such as Roma. In the 2014-2020 period, over €90 billion is being invested in building human capital and promoting social inclusion and fighting poverty through the European Social Fund (ESF) and the European Regional Development Fund (ERDF). Over € 80 billion have been allocated to investment in human capital in the fields of employment, education, and social inclusion, including access to health care and health promotion via the ESF. Member States have allocated 25% of the ESF's total budget (€ 20 billion) to measures aimed at social inclusion. In this area, a specific investment priority for the integration of marginalised communities, such as Roma, has been established to allow for explicit but not exclusive targeting and better monitoring the results. Additionally, on the basis of the Partnership Agreements, Member States are devoting € 10.8 billion of their ERDF allocations for promoting social inclusion and combating poverty. Within this framework, a number of investment priorities are used for funding Roma inclusion, such

⁶Declaration on promoting citizenship and the common values of freedom, tolerance and non-discrimination through education adopted by Commissioner Navracsics and Education Ministers in 2015, see https://ec.europa.eu/commission/sites/cwt/files/dp_mobilisation_europeenne_20150317.pdf.

as investment in social, health or education infrastructure, and providing support for physical, economic and social regeneration of deprived communities.

In addition, the European Commission has increased its policy support also under the European Semester of the Europe 2020 strategy, and linked the EU funding to policy priorities. In 2015, the European Commission addressed the Country Specific Recommendations (CSRs) to promote the participation of Roma children in quality inclusive early childhood and school education for the five Member States with the largest Roma communities and most acute challenges: Bulgaria, Czech Republic, Hungary, Romania and Slovakia.

Council recommendation for Bulgaria:⁷ *“Adopt the reform of the School Education Act, and increase the participation in education of disadvantaged children, in particular Roma, by improving access to good-quality early schooling.”*

Council recommendation for the Czech Republic:⁸ *“Adopt the higher education reform. Ensure adequate training for teachers, support poorly performing schools and take measures to increase participation among disadvantaged children, including Roma.”*

Council recommendation for Hungary:⁹ *“Increase the participation of disadvantaged groups in particular Roma in inclusive mainstream education, and improve the support offered to these groups through targeted teacher training.”*

Council recommendation for Romania:¹⁰ *“Increase the provision and quality of early childhood education and care, in particular for Roma.”*

Council recommendation for Slovakia:¹¹ *“Increase the participation of Roma children in mainstream education and in high-quality early childhood education.”*

In line with the CSRs under the European Semester, all above mentioned Member States have set out in their Partnership Agreements how they will use the possibilities of each fund to tackle Roma integration. They all have selected the new ESF investment priority on the socio-economic integration of marginalised communities. In addition, the Member States have chosen a number of key tools available under the new ESIF

⁷Council Recommendation on the 2015 National Reform Programme of Bulgaria and delivering a Council opinion on the 2015 Convergence Programme of Bulgaria. COM(2015) 253.

⁸Council Recommendation on the 2015 National Reform Programme of the Czech Republic and delivering a Council opinion on the 2015 Convergence Programme of the Czech Republic. COM(2015) 254.

⁹Council Recommendation on the 2015 National Reform Programme of Hungary and delivering a Council opinion on the 2015 Convergence Programme of Hungary. COM(2015) 266.

¹⁰Council Recommendation on the 2015 National Reform Programme of Romania and delivering a Council opinion on the 2015 Convergence Programme of Romania. COM(2015) 272.

¹¹Council Recommendation on the 2015 National Reform Programme of Slovakia and delivering a Council opinion on the 2015 Convergence Programme of Slovakia. COM(2015) 274.

framework in order to improve the efficiency of EU funds for Roma inclusion. For example, territorial and integrated approaches addressing the specific needs of regions most affected by poverty and target groups at highest risk of social exclusion.¹²

Even though, the institutionalised anti-Roma discrimination by state authorities has reduced significantly during the post war period, it was not eliminated completely. Discriminatory attitudes of state authorities against Roma can still be observed in many European countries, particularly in the Central and Eastern Europe. The most widespread forms of the institutionalised anti-Roma discrimination are linked to deficiency in the functioning of various public institutions and/or the way regulations are implemented and enforced by central, regional and local authorities. Examples of the institutionalised anti-Roma discrimination taking place in Central and Eastern European countries include an abusive behaviour of police towards Roma, failure of the justice system to investigate racist abuses, forced evictions, an unequal treatment of Roma children by the mainstream schooling system (e.g. segregation, abusive behaviour of teachers, inferior education), failure of official authorities to take active actions (stand) against racist attitudes towards Roma, etc. (Petrova 2004; Mudde 2005; Cviklova 2015). The anti-Roma bias present in state institutions is not limited only to the CEE, official authorities have undertaken a number of measures against Roma also in several Western European countries. For example, France and Italy introduced anti-Roma laws and deported Bulgarian and Romanian Roma during the period of 2008 to 2010, which seemingly resembled the expulsion measures applied towards Roma in the Middle Ages (Marinero 2009; Korando 2012; Parker 2012; Agarin 2014).

Further, the anti-Roma attitude is supported by various extremist and radical political parties active in almost all European countries. Many of these political parties legitimise their existence and build their political capital by prototyping minorities as a burden to the mainstream society and as a cause of societal problems (Pettigrew 1998; Rydgren 2005). Among other minorities, Roma are a common target of extremist and radical political parties in Europe and face negative attitudes existent among groups in the mainstream population to gain votes and the political power (Halasz 2009; Bernát et al. 2012; Stewart 2012; Ram 2014).

¹²For more details about currently implemented/proposed EU Roma integration policies see European Commission (2016).

4. Informal Roma institutions

4.1. Romaniya

In their traditional way of living,¹³ Roma are governed by informal institutions, which in praxis substitute state institutions to sustain a specific social order.¹⁴ Greif and Laitin (2004) define institutions as “a system of humanmade, nonphysical elements – norms, beliefs, organizations, and rules – exogenous to each individual whose behavior it influences that generates behavioral regularities.” Informal institutions of the Roma community include a set of rules (or law) called *Romaniya*,¹⁵ which govern the conduct of community members. These rules are based on superstition and ritual beliefs used to sustain a certain social order and to ensure the enforcement of informal institutions. *Romaniya* institutions are customary and oral; they are administered and enforced through a peer-based system. The *Romaniya* legal system coexists with the (formal) legal institutions of countries, where Roma reside. Being preserved orally, *Romaniya* is being permanently adjusted and its application varies across Roma communities. However, the main principles are common (Fraser 1995; Weyrauch 2001; Leeson 2013).¹⁶

Romaniya is a self-enforcing institution, where the individual behaviour is sustained by its members’ belief in a certain socio-economic order instead of formal e.g. state institutions. According to Greif (2004) and Greif and Laitin (2004), key elements of a self-enforcing institution are beliefs and rules. They are exogenous to each individual but endogenous to a group using the particular institution as a whole. Beliefs include the common knowledge that individuals hold about the other individuals’ behaviour (or about the functioning of the surrounding world) and the implied causal relationship between actions and outcomes. This knowledge is shared among all members of the society, it provides motivation for the behaviour of its members. In self-enforcing

¹³Note that nowadays not all Roma communities follow the traditional Roma way of living. Moreover, as noted in section 2.1, there are important differences between Roma communities in the CEE, in the Balkans, in the Western Europe, and in the Northern Europe.

¹⁴This institutional system refers to Vlax Roma of Romanian origin.

¹⁵This should not be confused with Romania which refers to a country name. The apparent similarity is just a coincidence.

¹⁶Similar societal orders enforced through superstition and beliefs can be found also in other societies. Posner (1980) argues that superstition in ‘primitive societies’ may promote norms of group sharing that sustains social insurance. Leeson (2012) investigates medieval legal systems that used superstition to secure criminal justice. In the presence of costly information and monitoring, religious belief-based ordeals of fire and water were used to determine defendants’ private information about their criminal status (i.e. their guilt or innocence). Leeson (2014) notes that in the absence of state-supplied property protection, medieval clerics exploited superstition (curse) to protect Church property rights against potential predators.

institutions, the belief-induced behaviour is self-enforcing, leading individuals to act in a manner that reproduces the associated beliefs. Informal rules are instructions that facilitate and coordinate individuals in choosing a particular behaviour in line with the belief system. They are outcomes of a sustained interaction between individuals as a response to the belief system and define how individuals should behave in various circumstances.¹⁷ Rules help to address the information imperfections, transaction costs and the bounded rationality of individuals in providing in a condensed (aggregated) form information that is necessary to direct behaviour consistent with the belief system. However, in a self-enforcing institution, rules correspond to an equilibrium situation, where the induced behaviour by rules is the optimal choice of individuals and reproduces a given belief system (Greif 2004; Greif and Laitin 2004; Myerson 2004; Aoki 2007).

Romaniya relies on a ritual belief system with its core concept distinguishing between the behaviour that is polluted (*marimé*) and pure (*vujo*).¹⁸ In the Roma's belief system *Marimé* is perceived as morally and spiritually (ritually) "dirty," though not necessarily physically.¹⁹ It has important implications for the Roma behaviour, as it determines actions and behaviour that are accepted and are in line with *Romaniya* rules. *Marimé* has a dual meaning. It refers both to the state of pollution as well as to the sentence of expulsion imposed for the violation of purity rules or any other behaviour against *Romaniya* rules (Weyrauch 2001; Leeson 2013).

Although, the concept of *marimé* represents a fundamental instrument for enforcing *Romaniya* rules, it is also argued that the pollution taboos evolved partly to prevent the spread of diseases among people living in poverty and deprived conditions (McLaughlin 1980; Okely 1983). The main source of pollution (*marimé*) is the human body. According to *Romaniya*, the human body consists of pure and impure (polluted) parts, with waist as the dividing line. The lower part of the human body is polluted, while the upper part is fundamentally pure and clean. Any unguarded contact between the lower and upper parts of the human body is *marimé* and may lead persons, objects, food or topics of conversations to become *marimé*. Generally, women are less clean and are thus a higher source of contamination than men. The concept of purity and impurity follows a life cycle. Children are free of pollution until their puberty (except for the first six weeks

¹⁷They can be compared to a price mechanism in a market economy where prices are outcome of interaction of market agents and inform individuals about the scarcity and abundance of different products.

¹⁸Another reference to this polarity of belief is shame (*ladž*) and good-fortune (*baxt*) (Matras 2015).

¹⁹The belief system of the Roma varies from country to country and community to community, but many beliefs are common and vary only in the degree in which they are observed or applied (Patrin 2015).

after their birth). Also older Roma are less subject to *marimé*. Further, non-Roma (*gaje*) are unclean by definition, as they do not adhere to *Romaniya* rules. They are outside the accepted behavioural boundaries and they represent a constant danger of contamination. Therefore, non-Roma places (e.g. hospitals buses, schools, offices, jails, homes) and non-Roma objects (e.g. their prepared food) are polluted by definition (Fraser 1995; Weyrauch 2001; Leeson 2013).

4.2. Jurisdiction and enforcement of Romaniya

Romaniya rules are enforced at different levels of the Roma society, depending on the seriousness of the particular case. At the first level, the clan (*vitsa*) chief handles day-to-day conflicts within the Roma community. Conflicts between Roma from different clans are mediated through informal proceedings among chiefs of clans (*divano*). The third level of the conflict resolution is conducted within the informal court system *kris* (and judges *Krisnitorya*),²⁰ when the particular case cannot be settled at a lower instance, or when the case is particularly serious (e.g. divorces, economic disputes). The decision of *kris* is final and binding. The punishment imposed by *kris* depends on the seriousness of the offence.²¹ A sentence of *marimé* is the most severe punishment. It implies banishment (exclusion) of the offender from the Roma community. The punished offender is declared to be polluted and hence is a potential source of contamination (e.g. nobody should eat with such a person, objects touched by such a person must be destroyed, indifferent of the value of the object). For less serious offences, a temporary *marimé* can be imposed. In this case, the *Romaniya* offender is temporary banished from community until the resolution of the offence (e.g. until the *Romaniya* offender repays victims in the case of a theft). Other possible punishments imposed by *kris* include a community service, a monetary fine, etc. (Fraser 1995; Weyrauch 2001; Leeson 2013).

The enforcement of the *marimé* punishment is executed by the entire Roma community through a peer-to-peer pressure (i.e. is self-enforcing). There is no police or a prison system available for this purpose. The public declaration of verdict creates a common knowledge about the *marimé* lawbreaker. The threat of contamination ensures a peer-to-peer monitoring and execution of the imposed punishment within the whole Roma

²⁰Usually, the office of the judge is none permanent position. Some exceptions include Sinte Roma in Germany, where successful judges hold a life-long office, or Roma of central Poland, where the judge is a single person position and it is a combination of hereditary and elected office (Matras 2015).

²¹Note that even though *kris* appears as a formal institution, its decisions are influenced by of the whole community through its active participation at the proceedings (Weyrauch 2001).

community (Weyrauch 2001; Leeson 2013). According to Leeson (2013), due to high costs of monitoring the behaviour of community members,²² *Romaniya* encourages a self-executing punishment of an antisocial behaviour, by making pollution physically contagious. Punishment is sustained by rendering non-Roma as dangerously polluted. That is, the belief that pollution is contagious addresses the free-rider problem and facilitates self-enforcement in the same time,²³ while the exit from the Roma community is harshly punished by considering leavers as unclean, breaking any contacts and/or interactions with them.

Violation of rules against another Roma is perceived as an antisocial behaviour and thus is subject to punishment under *Romaniya*. However, this does not hold with respect to non-Roma. Given that non-Roma do not adhere to *Romaniya* rules, they are outside its jurisdiction. Being outside of *Romaniya* institutions, any offence committed against non-Roma is not subject to punishment. In fact, since non-Roma are considered to be outside the accepted societal behavioural boundaries, they represent a constant danger of contamination and thus an unfair behaviour against them is tolerated or even supported. Roma perceive offensive behaviour towards *gaje* not only as permissible, but they also to “engage in deliberately fraudulent practices” (Weyrauch 2001). As noted by Weyrauch 2001, “Under Gypsy law, theft and fraud are crimes only when perpetrated against other Gypsies.” For example, if a Roma steals from another Roma “the thief is publicly shamed and banished from the community until he or she has repaid the victim.” This element supports *Romaniya* to be self-enforcing, by clearly separating the accepted behaviour from the non-accepted behaviour and the associated payoffs while reinforcing the underlying beliefs.

These informal institutions of *Romaniya* have important implications for the behaviour of Roma with respect to non-Roma. It supports an adverse behaviour of Roma with respect to non-Roma. *Romaniya* does not punish offences against non-Roma, and hence it does not deter their occurrence. Combined with the belief that non-Roma are inherently polluted, it actually tends to stimulate Roma to conduct various petty crimes such as stealing, begging, cheating in contractual relations, etc. According to Leeson (2013):

"[f]or Gypsies, using one's cleverness to relieve a gajo of his money or property is a virtue, not a vice. Thus Gypsies don't scruple at defrauding fortune-

²²For example, due to the nomadic nature of the Roma life, a community wide communication and monitoring was costly in the past.

²³Because pollution is contagious, it inflicts pollution if contact is exercised with an infectious punished individual. This motivates individuals to avoid interactions and thus excludes (ostracise) the punished individual from the Roma community.

telling customers or engaging *gaje* in other confidence games. Abusing and defrauding government welfare programs is also a popular and important economic activity for modern Roma."

From the Roma perspective, the outside world is seen as an opportunity to make living, being it a legal or illegal activity (from a non-Roma standpoint). Roma do not share the value system of non-Roma, nor do they share the fundamental division of labour and the societal acceptance (prestige) or disapproval associated with various occupations and activities. For example, Roma considers that begging belongs to occupation similar to salesmanship or entertainment, as both types require similar skills. It is considered to be a comparable to a form of performance and entertainment, such as selling of used cars, fortune-telling, dancing, or playing music. The moral judgment of non-Roma is irrelevant and unimportant, as the Roma belief system does not recognise such endeavours (Matras 2014). As stated by Matras (2014):

"[t]hus stealing may be dispreferred as a means of making a living because of the risks attached to it, rather than in recognition of the value that [*Gaje*] attach to small items of personal possession. Because little importance is attached to [*Gaje*] attitudes, Roma are also unembarrassed to exploit outsiders' image of Gypsies – as poor, as scavengers, as sorcerers, as seductive, or as craftsmen; there is no 'shame' in relation to outsiders, since there is also no opportunity to appear honourable to outsiders."

Given that Roma activities are often semi-legal or illegal (from a non-Roma standpoint), Roma cannot rely on state courts to enforce their economic partnerships and contracts. State courts' willingness to resolve conflicts within the Roma community is thus rather low, as state authorities cannot support economic activities engaged in theft or fraud. This fact additionally reinforces Roma to rely on their own informal institutions for enforcing a social order within their community (Leeson 2013).

5. Social mobility barriers for Roma

5.1. Self-isolation and the cost of exit

Beliefs enshrined within *Romaniya* has direct and indirect implications for the social and economic behaviour of Roma. Most importantly, the belief system based on *marimé* that non-Roma are inherently polluted plays a key role in ensuring its self-enforcement

and makes the exit from the Roma society or interaction with non-Roma costly. As explained in section 4, an important source of impurity and pollution are non-Roma, their places and objects, because they do not obey to *Romaniya* rules.

Roma use the term *gaje* to refer to all non-Roma. Originally, it translates as peasants or uncivilised or uneducated persons, but it also has connotation equivalent to 'barbarians' in English (Weyrauch 2001).

"The Gypsies generally view the *gaje* as having no sense of justice or decency. ... Furthermore, not only do the Gypsies consider non-Gypsies polluted, they also believe that Gypsy names and rituals lose their magical effectiveness if uttered to *gaje*. Consequently, the Gypsies believe they should approach and respond to the *gaje* with caution, especially if the *gaje* profess good intentions." (Weyrauch 2001).

This perception of *gaje* is motivated by the fact that they do not conform to the rules of 'clean' behaviour, as established by *Romaniya*. As noted by Sutherland (2015):

"[b]ecause they [non-Roma] do not observe body separation, non-Gypsies are a source of impurity and disease. Public places where non-Gypsies predominate such as public toilets, hospitals buses, schools, offices, jails, and non-Gypsy homes are also potential sources of disease. All these places are less 'clean' than the home of a Gypsy or open outdoor spaces such as parks and woods. When they must be in non-Gypsy places, Gypsies generally avoid touching as many impure surfaces as possible, but, of course, prolonged occupation of a non-Gypsy place such as a hospital means certain impurity. In this case the person tries to lessen the pollution risk by using disposable paper cups, plates, and towels-that is, things not used by non-Gypsies."

Generally, Roma perceive non-Roma as having no sense of righteousness and good conduct. Even the behaviour of non-Roma that is in line with their own norms and formal rules is considered as immoral and unjust by Roma, if it does not conform with *Romaniya* (Weyrauch 2001).

A strict enforcement of *Romaniya* implies wide-reaching restrictions for Roma in all aspects of the social and economic life. According to *Romaniya*, Roma need to abstain from any socio-economic interactions with the mainstream society, except for those vital for the survival of Roma. Given that any unnecessary contact with non-Roma needs

to be avoided, it implies a self-isolation of Roma from the mainstream society. Hence, the informal institutions of Roma create certain 'boundaries', which separate between external and internal environments and impose behaviour that maintains distance from the mainstream society. Informal Roma rules inflict self-isolation from the surrounding society and economy, leading to a failure to realise potential benefits (e.g. from the gains of specialisation and trade) that would arise in the absence of self-isolation. This element of *Romaniya* plays a central and reinforcing role to the self-isolation and contributes to its sustainability, as it implies low payoffs for outside options. The threat of pollution from interactions with non-Roma increases the cost of exit although, economically taken, it would be beneficial to collaborate with the mainstream society.

Due to exit barriers, in traditional Roma communities socio-economic interactions between Roma and non-Roma are minimal and usually they do not go beyond the minimum necessary contacts. As Gropper (1975) states "*the economic sphere of life is the only link between [Roma] and gaje among whom they live.*" As regards social interactions, because of *Romaniya*, many Roma do not allow non-Roma for entering the private living spaces of their homes, although, in special cases, they may permit entering them in certain areas (e.g. in front rooms) after taking a number of precaution actions. For example, by providing with a special seat reserved for non-Roma or by using special cups, dishes and utensils, if food or drink is offered to non-Roma to avoid contamination (Leeson 2013). Analogously, food prepared by non-Roma is considered as polluted and thus needs to be avoided.²⁴ To avoid *marimé*, Roma would reject food prepared outside the Roma community (e.g. in restaurants, hospitals, prisons), which may inhibit contact with non-Roma. A strategy often used to reduce the pollution risks when eating away from home food is to use disposable dishes and cutlery,²⁵ to eat pre-packed food and drinking from cartons or bottles (Weyrauch 2001; Leeson 2013). For example, to avoid pollution, Roma patients may refuse food prepared by non-Roma in the hospital cafeteria, and prefer consuming homemade food instead (Honer and Hoppie 2004).

In situations, where it is not possible to completely avoid interactions with non-Roma, precautions must be undertaken to avoid contamination. Usually, however, a complete isolation from non-Roma is impossible. For survival reasons, Roma need to enter in economic transactions with non-Roma, because non-Roma control the major

²⁴The exceptions are children; they may eat food prepared by non-Roma given that they are less subject to the *marimé* rule.

²⁵Roma may simply eat with their hands rather than use cutlery that may not have been properly washed.

part of the economy. In order to minimise contacts with non-Roma while ensuring the economic survival, a typical Roma strategy is to engage in autonomous type of occupations and to take certain precautionary measures. For example, in their fortune-telling businesses, Roma cover seats with a protective slip to prevent non-Roma to pollute them (Leeson 2013). Generally, many Roma rely on trade and service activities, which do not depend on non-Roma nor require entering into conventional wage-labour relations. Economic activities based on self-employment (as opposed to wage-labour) allow Roma to adopt a flexible and detached lifestyle from non-Roma.²⁶ Ultimately, these fundamental structures of Roma economic institutions importantly contribute in sustaining their social and economic autonomy from non-Roma. "*All this provides the Roma with a notion of greater freedom and hence superiority over the [Gaje]*" (Matras 2015).

Based on the fieldwork about Roma musicians (*lăutari*) in Romania, Beissinger (2001) finds that their integration with non-Roma is limited solely to economic interactions, although, *lăutari* perceive themselves as a superior cultural group within the Roma community, which has strong common links with the mainstream population:

"Lautari fundamentally socialize only with other lautari, creating and perpetuating close, in-group relations based on occupation and ethnicity... in the many times that I have been in their home, other lăutari have dropped by to talk, drink, and play music on a regular basis, but other non-lăutar Romani visitors have been very rare. Not once in my stays with them, however, has a Romanian ever paid a social visit; Romanians stop by only to discuss performance arrangements (dates, payments, and so on)" (Beissinger 2001).

Another area, where self-imposed boundaries imply isolation of Roma from the mainstream society, is children education. Traditionally, Roma educate their children within families and the Roma community. Roma parents tend to avoid sending their children to non-Roma schools, as this poses a threat of contamination and alienation.²⁷ Further, an important part of the Roma self-education process is children's' acquaintance and learning community rules and values (Sway 1984; Matras 2015). This behaviour

²⁶In addition, this permits Roma to be independent from and unconstrained by a particular economic structure and skill requirements (to particular forms of production). It allows Roma to be operationally flexible and able to easily exploit new market opportunities and economic circumstances (Sway 1984; Matras 2015).

²⁷A critical period is during the puberty of children when they become subject to *marime* implying that certain activities need to be avoided (e.g. threats of pollution, join sexual education of boys and girls) and thus it is a common reason for parents to withdraw their children from school (Matras 2015).

contributes to the sustainability of the Roma specific social order, as it facilitates the inter-generational transfer of knowledge related to survival strategies (self-employment skills), community beliefs and rules.

Similarly, the Casa-Nova's (2007) study of a Roma community in the northern Portugal shows that the children's close contact to family and community members is fundamental in transferring the occupational knowledge and intra-community societal values to them. Roma children learn community rules and occupation through a daily contact and observation (and imitation) of their parents or other adults in the community. Parents usually take their children to fairs already from a young age, so that they can learn skills and gradually are able to conduct various tasks required by this profession.

5.2. Discrimination and the cost of entry

The anti-Roma discrimination by the mainstream society plays an important role in preserving (reinforcing) the separation between Roma and non-Roma in two segregated society groups. The willingness to accept Roma by the mainstream population is rather limited due to the pervasiveness of the anti-Roma discrimination. As discussed in section 3, the anti-Roma discrimination has been historically rooted during centuries of repressive policies and discriminatory attitudes from the mainstream population.

Schooling is a particularly good example of the segregation and marginalisation Roma children. Many Roma parents are reluctant to send their children to mainstream schools, because of hostile attitudes of non-Roma children and parents (often also of teachers) toward Roma children, which are widely observed in public schools in Europe (Kertesi and Kézdi 2013). This hostile behaviour increases the social costs of Roma children to acquire a formal education, as they may face emotional and/or physical abuse when attending a mainstream school. Such a hostile environment reinforces the demarcation line between Roma and non-Roma (i.e. it increases the entry costs) reducing chances of a successful school completion and lower probability of finding employment (Matas 2015).

Another example, where the anti-Roma discrimination increases the cost of entry, is the mainstream labour market. The anti-Roma discrimination restricts Roma access to employment, which reduces job opportunities for Roma on the mainstream labour market. First, due to the anti-Roma discrimination, Roma face lower level of the labour force participation and higher level of unemployment compared to non-Roma that share similar characteristics, location and social infrastructure (UNDP 2005; European Commission 2012b). Second, as discussed in section 2.2, even if employed, Roma receive lower wage for an equivalent job compared to non-Roma (Kertesi and Kézdi 2011; Drydakis 2012).

Third, the anti-Roma discrimination crowds-out Roma to low-skill jobs. Kahanec (2014) argues that, because Roma face high entry barriers into the mainstream labour market, it is likely that those Roma that succeed in overcoming the barriers possess superior skills compared to their non-Roma counterparts, as they are not exposed to a comparable discrimination.

5.3. *Discrimination, self-isolation and their interactions*

From a policy perspective, the key question is to what extent the social and economic marginalisation of the Roma population is induced by the self-isolation enshrined by *Romaniya* rules and to what extent by the anti-Roma discrimination exercised by the mainstream society? In order to identify, design and implement efficient policy measures, one needs to understand these two phenomenon and isolate their impact on the social and economic marginalisation of Roma.

Our findings from previous sections suggest that both the self-imposed isolation of Roma and the anti-Roma discrimination by the mainstream society may mutually reinforce each other and thus may be responsible for the segregation of Roma and non-Roma in two parallel societies. On the one hand, the anti-Roma discrimination contributes to a negative perception of Roma about non-Roma. Negative discriminatory experiences of Roma tend to strengthen their negative perception of Roma about non-Roma, and they reinforce beliefs about the correctness of the *Romaniya* belief system that *gaje* are inherently impure. On the other hand, *Romaniya's* internal rules that require avoiding any interactions with non-Roma, and tolerate an adverse behaviour towards non-Roma, which generates distrust towards Roma in the mainstream society and fuels further discriminatory behaviour. The behaviour of both Roma and non-Roma is guided by a mutual believe that the other group is dishonest and employs unfair practices, which justifies the negative attitude towards the other group. While the anti-Roma discrimination reinforces the negative attitude of Roma against non-Roma, the induced response in the Roma behaviour contributes to creating negative stereotypes about them and a negative perception by the mainstream society, further strengthening the discrimination of Roma. Hence, it is a vicious circle, where mutual attitudes and the behaviour of Roma and non-Roma are self-reinforcing.

5.3.1. *Anti-Roma discrimination*

One central reason of the social and economic marginalisation of Roma is centuries of the anti-Roma discrimination, which has affected the behaviour of Roma. To cope

with discriminatory attitudes and policies imposed on them (slavery, expulsion policies, genocide, forced assimilation), particularly prior to the middle of the 20th century, Roma had to adapt and invent various survival strategies. Sway (1984) identifies several strategies that allowed Roma to survive in hostile environments imposed by the mainstream society that enabled them to exploit various niche and marginal markets unattractive to the mainstream population. Most of these, over centuries adopted survival strategies of Roma (as a response to the discrimination by the mainstream society) are considered as being outside of social norms of the mainstream society, which contributes to fuelling the anti-Roma discrimination. Hence, discrimination triggers an adoptive behaviour that often is beyond the social norms of the mainstream society, which in turn causes further discrimination.

In response to the *labour market discrimination*, Roma have adopted several alternative occupation-related strategies: (i) nomadism, (ii) exploiting available resources viewed as worthless by the mainstream population, (iii) avoiding a gender biased division of labour, (iv) avoiding age barriers in the labour supply, (v) becoming multi-occupational, and (vi) entering into semi legal or illegal activities to bypass the discriminatory regulations of economic activities imposed on them. Nomadism allows Roma to flexibly exploit market opportunities dispersed across different locations according to the local needs by moving to locations where gaps in the labour supply and demand arise in the host society. Nomadism also enables Roma to address the seasonality issue of many low-skill occupations (e.g. between the winter and summer periods) by moving to locations where economic opportunities are available (e.g. typical summer occupation is fortune telling, entertainment and casual agricultural works, while in winter Roma tend to move to more densely populated areas dealing, for example, with used cars, collection of scrap metals) (Sway 1984). Roma usually do not face a moral barrier in exploiting available resources, which are viewed as worthless or even humiliating by the mainstream population. Such activities are perceived as acceptable or honourable and allow Roma to exploit market segments disregarded by the mainstream population (e.g. collecting of scrap metal, brick manufacturing, rag collection, manufacture of wooden objects, etc.) (Sway 1984). Roma tend to avoid gender bias at work, as they have no cultural predisposition to enforce a specific division of labour between men and women. They allocate tasks within family to maximise family (community) benefits. For example, if the fortune-telling business of women is successful, all family members adapt their activities to support women, without causing an embarrassment for men (e.g. men may assume responsibility for advertising,

obtaining consumers, child care) (Sway 1984). Similarly, Roma tend to avoid age barriers, when allocating work responsibilities within families or communities. All members of the family or community are expected to contribute to earn living, which usually reflects the comparative advantage of a particular age group. For example, children may contribute with auxiliary labour in family business, or perform certain activities where they have better predisposition than adults (e.g. begging). Elder adults may contribute to the income of the Roma family or community by qualifying for welfare benefits (Sway 1984). Further, Roma tend to diversify occupations by being active in multiple economic activities, which provide certain 'security of income' and enable them to flexibly adapt, when some occupations cease to be profitable or become forbidden by the mainstream population (Sway 1984). As discussed in previous sections, yet another survival strategy is to enter into semi legal or illegal activities to bypass the discriminatory regulations of economic activities imposed on them (e.g. procuring false documents, involvement in petty crimes such as stalling to cope with occupational restrictions) (Fraser 1995).

In response to the *social discrimination*, Roma have adjusted also their life-style by: (vii) locating in less accessible territories or regions to be out of the reach of public authorities and (viii) concentrating in large groups to facilitate self-protection and safety-net provision. One common strategy applied to cope with the anti-Roma discrimination and repressive policies of the mainstream society in Europe, particularly prior to the World War II, was to locate in remote regions (e.g. inaccessible waste-lands or forests) or border regions, where access of public authorities is limited. Also nowadays Roma often settle in segregated communities either in rural areas or in suburbs of cities. Lawless et al. (1997) argues on the idea of autonomy that Roma '*have often sought peripheral locations on the edge of cities because in such locations they may be able to minimise the interference of social control agencies and to maintain their cultural separation from the defining gaje*' (Lawless et al. 1997; Sibley 1998). Hence, one can argue that the spatial self-isolation of Roma is an outcome of a combined effect of the anti-Roma discrimination and the self-imposed isolation of Roma.²⁸ In addition, there is a widespread resistance to the registration of births and marriages among Roma (Creţan and Turnock 2009). The preference of Roma for a self-education and reluctance towards a formal schooling is reinforced by the hostile attitudes of non-Roma children and parents (often also of teachers) towards Roma children, which is widely observed in public schools in several European countries. Such

²⁸Two other reasons of the spatial self-isolation could be also an outcome of economic deprivation and missing employment opportunities, and the self-exclusion embodied in *Romaniya*.

a hostile environment is conducive in strengthening the belief and perception among Roma children about inherently polluted non-Roma value system (Kertesi and Kézdi 2013; Matas 2015). Further, as a response to the social and physical discrimination by the mainstream society, often Roma tend to concentrate in large communities to facilitate self-protection. This allows Roma to protect themselves against state authorities with an anti-Roma bias or physical discrimination by the mainstream population. Further, the concentration of Roma in monolithic communities allows to sustain social fabric of their institutions and social order and it creates an environment that can provide safety net protection of their life-style against external adverse environment (discrimination).

5.3.2. *Informal institutions of Roma*

Besides the anti-Roma discrimination, also informal *Romaniya* rules contribute to the social and economic marginalisation of Roma. Some elements of the Roma-specific behaviour described in section 5.2 reinforce resentment in the mainstream population, ultimately being reflected in an even stronger discriminatory behaviour.

As regards the self-isolation on the labour market, Roma usually try to avoid occupations (e.g. wage-labour relations) that imply working under *gaje* (see section 4). The self-imposed isolation of Roma, embodied within informal Roma institutions, leads to adverse networking effects reflected in reduced availability of opportunities linked to labour markets or other economic activities. This inward-looking nature of Roma's social relationships magnifies distrust and the economic exclusion (Smith and Greenfields 2012). For example, as argued in section 2, the social networking is found to be an important determinant in accessing labour market opportunities in the presence of asymmetric information and search costs (Arrow 1998; Montgomery 1991). This is reinforced by discriminatory attitudes against Roma and thus further exacerbates the social networking effect. Discriminatory attitudes reflect resentment of Roma by the mainstream population and imply their exclusion from the mainstream social networks. If instead the social interaction would not be hampered by discrimination and the self-imposed isolation, this could facilitate a better understanding and inter-group exchange of information about the actual abilities and skills of Roma and thus could improve their prospect in the labour market.

As regards the educational self-isolation, Roma children are traditionally educated at home within families by involving them in family activities (professions). Children observe, participate, and gradually take over responsibilities of the family business. As discussed in section 4, Roma perceive schools as a *gaje* world, which represents a

particular threat to their children's' educational development. It conflicts with the Roma value system, as it is in breach with the traditional Roma educational habits and it carries the danger to alienate Roma children from their own traditions and beliefs (Casa-Nova's 2007; Matras 2015). Moreover, the traditional Roma educational requirements are in general incompatible with the mainstream schooling system, which relies on a specialised external (away from family) form of education. This generates frictions with the mainstream schooling system, often resulting in low educational attainment rates of Roma pupils. Additionally, a family-based education limits Roma children in acquiring other type of skills than those available and/or necessary within the own community.

An important implication of this behaviour is that Roma children may fail to obtain formal school degrees, resulting in discrimination on the labour market. Because of lacking formal school diplomas and a certified job experience, the self-imposed isolation in education and the labour market reduces the chances of Roma on the formal and legal job market.

5.4. Policies for reducing social mobility barriers

As discussed above, the self-isolation (exit barriers) and the anti-Roma discrimination (entry barriers) are interrelated social phenomena of the Roma and non-Roma coexistence and they need to be considered jointly for understanding the social (im)mobility of Roma. As discussed in section 5.1, the self-isolation and exit costs are sustained by a Roma specific belief system and are reinforced by the anti-Roma discrimination, whereas Roma beliefs about the inherent impurity of non-Roma and the associated behaviour strengthen the anti-Roma discrimination prevalent in the mainstream society. Any societal changes (including policies) affecting either the non-Roma or Roma population will impact both the anti-Roma discrimination and the Roma belief system. If Roma beliefs about non-Roma are altered through a policy or any other change in the external environment, it impacts directly the self-isolation and the exit cost of Roma and indirectly the anti-Roma discrimination by shifting the non-Roma's perception about Roma. Instead, if the anti-Roma discrimination is altered by a policy or an external change, it has a direct effect on the entry cost of Roma into the mainstream society and an indirect feedback effect on Roma beliefs about non-Roma.

It must be recognised that a reduction or elimination of social mobility barriers is a long-term process that may take several generations to be fully realised. Changing the anti-Roma discrimination requires change in perceptions and beliefs of the mainstream society about Roma. Given that the anti-Roma discriminatory attitudes by the mainstream

society have been in place over many centuries, their replacement requires changes in the functioning of public institutions as well as changes in the behaviour of society. Further, as discussed in section 5.3, the anti-Roma discrimination reinforces the Roma's belief system and their informal institutions, which are strengthened by attitudes and pressures coming from the mainstream society over a long period and represent a protection or safety environment against external adverse behaviour (discrimination). To alter this behavioural equilibrium of Roma and non-Roma requires changing beliefs and perceptions of both Roma and non-Roma. Following the theory of the endogenous institutional change, an institutional change is an evolutionary process, where beliefs and perceptions that guide a society's behaviour adjust gradually to policy or changes in the external environment. The underlying change needs to be persistent and consistent to induce institutional adjustments. Further, this theory argues that there is a strong path dependency of formal and informal institutions, where past institutional patterns tend to persist over long periods of time due to various factors, such as asymmetric information, sunk costs of coordination, free-rider problems and uncertainties, and thus any policy change may not induce an institutional change if it is not sufficiently strong and sustained over a sufficiently long time period (Greif 2004; Greif and Laitin 2004; Myerson 2004; Aoki 2007; Kingston and Caballero 2009).

A key driver of an institutional change is change in the belief system (Greif 2004 and Greif and Laitin 2004; Myerson 2004; Aoki 2007, Ciaian et al 2012). According to Greif (2004) and Greif and Laitin (2004), changes in informal institutions can occur due to endogenous processes, exogenous shocks, e.g. policy interventions, or a combination of both resulting in changes in beliefs and the associated behaviour of its members. "*An institutional change is a change in beliefs, and it occurs when the associated behaviour is no longer self-enforcing, leading individuals to act in a manner that does not reproduce the associated beliefs*" (Greif and Laitin 2004).

In order to be sustainable, a change in the Roma behaviour (e.g. mistrust towards non-Roma) must be associated with changes in beliefs or expectations about the other community's behaviour. A source of such a change could be policies targeting Roma beliefs about non-Roma. Examples of specific policies could include various social integration policies promoting inter-cultural exchanges, the promotion of the public awareness or the provision of the social support or assistance to Roma communities without changing their underlying life-style. Such policies would target the exit cost side of social mobility barriers faced by Roma and thus would improve their acceptance of the

socio-economic cooperation and interaction with non-Roma. In turn, a policy-induced higher acceptance of non-Roma by Roma may increase the inter-societal trust and reduce the self-isolating behaviour of Roma, which could have a positive feedback on reducing discriminatory attitudes by the mainstream population.

A critical element to enhance the social mobility of Roma is the issue of entry costs into the mainstream society associated with the anti-Roma discrimination. In the presence of the anti-Roma discrimination, Roma cannot realise the gains from socio-economic interactions with non-Roma, even if the self-isolation and the exit cost would be absent. In contrast, in absence of the anti-Roma discrimination, the socio-economic opportunities available within the mainstream society could be fully exploited and thus increase the opportunity costs of the self-isolation which subsequently would improve the social mobility of Roma. Reducing the anti-Roma discrimination could have also a significant feedback repercussion for the Roma belief system. It may foster Roma communities to break away from the existing belief system and move towards new beliefs that accommodate interactions and cooperation with non-Roma (though not necessarily changing the whole underlying belief system and the life-style). Without a significant reduction of the anti-Roma discrimination by the mainstream society, the transition away from a self-isolation toward integration with the mainstream would be severely hindered. Instead, the negative attitudes of Roma towards non-Roma may remain in place in the Roma belief system, and thus contribute to the self-isolation.

Fundamental for facilitating the adjustment of the Roma belief system and hence reducing their social mobility barriers is recognising the fact that the Roma's belief system (and thus self-isolation), and the anti-Roma discrimination by the mainstream society are interlinked. The self-exclusion of Roma and the associated beliefs could be altered if negative attitudes of non-Roma would decrease, which could be attained by a sustained non-discriminatory policy in all spheres of the socio-economic life. Note that such a policy needs to be maintained over a long period of time, because changes in the Roma behaviour (e.g. mistrust towards non-Roma) require changes in their belief system and expectations of the whole community, eventually requiring even several generations. Beliefs need to readjust to incorporate outcomes and expectation that Roma can obtain through interactions with the mainstream society (Greif 2004; Greif and Laitin 2004; Myerson 2004; Aoki 2007; Kingston and Caballero 2009). Any ad-hoc and/or short-term policy intervention applied to the discrimination issue of Roma may fall short to represent a credible structural change in the mainstream society's attitude towards Roma and thus

may fail to change the Roma belief system about their outside opportunities.

An important policy that could alleviate entry barriers of Roma by improving their outside opportunities represents a *positive discrimination* through giving preferential treatment, for example, in the children education and the labour market. Another important area of policy actions could include targeting negative perceptions and prejudices about Roma through media and various public awareness programmes. The negative stereotyping of Roma is often supported by the mass media, which helps to maintain negative anti-Roma attitudes among the mainstream population. Articles published about Roma in the mass media are often presented without an accurate and thorough analysis of the context behind the reported story and tend to reproduce racist stereotypes and prejudices prevalent within the mainstream population (Morris 2000; Stewart 2012; Di Giovanni 2014; Vidra and Fox 2014). Hence, ensuring an unbiased mass media provides an important interface for policy intervention.

Policies addressing the entry barriers of the Roma social mobility are similarly expected to have a positive multiplier feedback on the anti-Roma discrimination. The improved attitudes towards Roma (e.g. if the anti-Roma discrimination is eliminated) may unlock the negative Roma belief about non-Roma, which may reduce the dishonest behaviour of Roma towards non-Roma, and ultimately may increase the mutual trust and further reduce the discriminatory attitudes of the mainstream society.

In summary, a crucial element of any policy action is that any policy initiative addressing social mobility barriers for Roma needs to be implemented and sustained over a long period of time in order to be credible and to have a sustainable impact on reducing the social and economic marginalisation of Roma. Policies need to provide persistent signals to Roma of their equal (or favourable) opportunities outside their community, which will guide the individual behaviour and provide stimulus for an endogenous institutional change within the Roma community as well as change in perceptions of non-Roma about Roma. Second, both exit and entry barriers need to be addressed simultaneously, as they are mutually interlinked.

6. Conclusions

The present paper studies the causes of the social and economic marginalisation of Roma, in particular, the role of social mobility barriers. We have identified two types of social mobility barriers for Roma: the cost of exit from the traditional Roma community and the cost of entry into the mainstream society. Entry barriers determine to what

extent the mainstream society is willing to accept Roma within their socio-economic structures which, as we show in the paper, often are discriminatory. Since their arrival to Europe in the 15th century, Roma have faced direct discriminatory attitudes from the mainstream society and institutionalised discrimination reflected in anti-Roma policies – ranging from expulsion measures, forced assimilation up to enslavement – imposed by state authorities across Europe lasting for over six centuries. Only after the World War II the attitudes of state authorities towards Roma started to change, when integration became one of the main European policy paradigms to address problems associated with the social and economic marginalisation of minorities. However, even in the presence of the improved policy framework, the anti-Roma discrimination has largely remained in place till present days in most social and economic spheres of life.

The anti-Roma discrimination poses a major problem for the social mobility of Roma, as it constrains their integration and interactions with the mainstream society. More precisely, the anti-Roma discrimination reduces Roma benefits from socio-economic opportunities outside their community such as, education, labour market or other infrastructure. Overall, the anti-Roma discrimination plays an important role in preserving the segregation between Roma and non-Roma in two parallel society groups.

In this paper we argue that another important factor that restricts the social mobility of Roma is the Roma-specific informal institution called *Romaniya*. *Romaniya* contains a complex system of rules based on a superstitious belief system, which incentivise its members to sustain a socio-economic order separate from the mainstream society. It relies on a ritual belief system with its core concept distinguishing between a behaviour that is polluted (*marimé*) and pure (*vujo*). *Marimé* has important implications for Roma, as it determines actions and behaviour which are accepted and are in line with the *Romaniya* social order. Given that non-Roma are considered as inherently polluted. A strict enforcement of *Romaniya* implies wide-reaching restrictions for Roma in all aspects of the social and economic life. According to *Romaniya*, Roma need to abstain from any interactions with the non-Roma society, except for those vital for the survival of Roma. The belief enshrined within the *Romaniya* that non-Roma are inherently polluted plays a key role in ensuring its self-enforcement and makes the exit from the Roma society or interactions with non-Roma costly. More precisely, the outside opportunities available within the mainstream society (such as education and employment) are perceived as undesirable actions, which are sanctioned within *Romaniya*. Through the self-imposed isolation *Romaniya* contributes undeliberate to the social and economic marginalisation

of Roma.

Further, the findings of our paper suggest that both exit barriers (self-isolation and exit costs) and entry barriers (anti-Roma discrimination) reinforce mutually each other and both are responsible for the segregation of Roma and non-Roma into two parallel societies. On the one hand, the anti-Roma discrimination contributes to preserving the negative perceptions of Roma about non-Roma, harmful discriminatory experiences of Roma tend to strengthen their negative perception about non-Roma, as they reinforce beliefs about the correctness of the *Romaniya* belief system that non-Roma are inherently impure and dishonest. On the other hand, *Romaniya's* internal rules require avoiding any interactions with non-Roma, and tolerate a detrimental behaviour towards non-Roma. The isolated traditional life-style generates distrust towards Roma in the mainstream society and triggers a further discriminatory behaviour. Hence, it is a vicious circle, where mutually adverse attitudes and behaviour between Roma and non-Roma are self-reinforcing.

Findings of this paper suggest that, from a policy perspective, it is important to acknowledge and understand that the two types of social mobility barriers – the cost of exit from the traditional Roma society and the cost of entry into the mainstream society – have different causes and hence have to be addressed by different policy instruments. It is also important that both types of social mobility barriers are addressed simultaneously, as they interact and reinforce each other mutually.

Policies targeting the exit barriers of the social mobility could include various social integration policies promoting inter-cultural exchanges, the public awareness or the social assistance. These type of policies would target the exit costs of social mobility barriers faced by Roma and thus may improve their acceptance of socio-economic cooperation and interaction with non-Roma. Policies targeting the entry barriers of the social mobility could include measures that promote a positive discrimination of Roma in various socio-economic areas (e.g. education and employment) and that target the negative perceptions of non-Roma about Roma in media and various public awareness programmes. It is also important that any policy measure needs to be implemented and sustained over a long period of time to have a sustainable impact on reducing the social and economic marginalisation of Roma. It needs to provide a persistent signal to Roma of their equal (or favourable) opportunities outside their community.

Although, differentiated policies should be designed to address the exit and entry barriers of the Roma's social mobility, it needs to be recognised that their effectiveness

will be limited if they are not implemented simultaneously. As argued in this paper, the exit barrier is sustained by the Roma specific belief system and is reinforced by the anti-Roma discrimination, whereas Roma beliefs about the inherent impurity of non-Roma is strengthened by the anti-Roma discrimination prevalent in the mainstream society. Further, a critical element to enhance the social mobility of Roma is the issue of entry barriers into the mainstream society because, due to the anti-Roma discrimination, Roma cannot realise gains from socio-economic interactions with non-Roma even if exit barriers were absent.

Findings of this paper have to be considered, however, with some caution and need to account for the underlying assumptions implicitly imposed in the above analysis. In the present study we have investigated a number of stylised facts, such as the adherence of Roma to *Romaniya*. However, in reality the application of *Romaniya* varies from community to community. A number of studies have shown that the adherence of Roma to the *Romaniya's* traditional value system has reduced to some extent in some European Roma communities over the last decades. Thus, when analysing social mobility barriers for Roma (i.e. entry and exit barriers) or designing policy responses, first one has to understand local conditions and the relative importance of the two types of social mobility barriers in the particular place in order to be able to propose effective and efficient policy solutions.

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