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Navigating Power and Intersectionality to Address Inequality

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Summary

This paper examines the drivers of inequality and social exclusion, especially discrimination, with a focus on how they intersect at the levels of family, community and local government institutions. The paper reviews current literature and emerging research, drawing on empirical work being carried out by the authors in Central and Eastern Europe, the UK and Africa. Theories of intersectionality and power relations are grounded in an analysis of Roma inclusion policies and Roma people's own experiences of these policies at the local level in Central and Eastern Europe, focusing on Hungary, Romania and, to a lesser degree, Serbia. Examples are also drawn from participatory research with marginalised communities in Ghana.

Keywords: Roma, intersectionality, inequalities, discrimination, power, social inclusion.

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Acknowledgements

Acronyms

CEE	Central and Eastern Europe
CSO	civil society organisation
DDLG	Democratization, Decentralization and Local Government (SDC)
EU	European Union
MSG	minority self-government
NGO	non-governmental organisation
PISA	Programme for International Student Assessment
ROMED	European Training Programme on Intercultural Mediation for Roma Communities
SDC	Swiss Agency for Development and Cooperation
SDG	Sustainable Development Goal
WSSR	World Social Science Report

Practice summary

This paper is concerned with Roma inclusion. Inequality plays a fundamental role in subordinating Roma populations. Due to structural discrimination against Roma ('antigypsyism' or 'Romaphobia'), Roma and associated groups find themselves in positions of relative powerlessness (Alliance against Antigypsyism 2016). Exclusion is produced through the *intersection of* inequalities: spatial, economic, social, political, environmental, cultural, knowledge and also identity-based. It is rooted in social relations within and between families, communities and decision-makers. Power operates through these social relations, and creates barriers and disincentives for duty-bearers to be inclusive. The intersection of different forms of disadvantage produce persistent and intergenerational poverty, and entrenches perceptions that the marginalisation of certain groups is justified, since the drivers of these disadvantages are often invisible.

Action to address intersecting inequalities must be based on the understanding that the multiple forms of exclusion which marginalised people experience are not caused by their social or cultural identities in themselves, but by historical and normalised processes of cultural and social discrimination, which in turn shape decisions about access to spatial, economic and environmental goods. Roma inclusion work needs to engage with the institutions and processes that perpetuate antigypsyism, and with the normalised attitudes or 'social norms' that keep it in place.

Key findings:

- Inclusion initiatives tend to focus on social and economic inequalities and promote access to employment and services. These may fail to transform structural discrimination if they do not also consider knowledge and political inequalities and address the barriers faced by discriminated groups to have voice and be represented in decision-making arenas. Inclusion policies that encourage citizen engagement and value the knowledge of marginalised groups are critical.
- Those who enjoy privilege through belonging to socially privileged groups, and who often end up holding power as duty-bearers, can easily feel threatened in that position when socially stigmatised groups fight for their emancipation. This can lead to a backlash. It is important therefore, to pay attention to how activists, practitioners and policy-makers born to privilege can process their positionality, so that they are prepared to work with the disadvantaged in negotiating and even sharing positions of power.
- Duty-bearers and development professionals should make it a priority to engage with the concept of power and identify effective approaches to addressing inequalities that local governments, civil society organisations and activists can adopt to transform power relationships, address privilege and promote inclusion.
- Discrimination, tacitly accepted and not addressed, is corrosive. However, once acknowledged, processed and resisted, it can become a driver for change – not just for the marginalised but also for the powerful.
- Using an intersectionality lens can help policy-makers to design more effective social inclusion strategies because they bring a more nuanced understanding to addressing discrimination in its multiple forms, particularly when used alongside power analysis.
- The lack of attention to the terms of inclusion means that policy-makers are ignorant of (or choose to ignore) the trade-offs involved, for example improved housing may impact on access to employment, family support, decent education, health, etc. Because of this lack of awareness of how a change in one policy area can affect others, social inclusion interventions may perpetuate marginalisation.
- Working from a linear theory of change and without information on the realities and hopes of the affected persons, fails to address discrimination and ultimately is not a good

use of resources. Effective policies are underpinned by theories of change that are multi-stranded, working in partnership with activist groups, NGOs and government institutions.

- Community and informal local self-government structures can play an active role in promoting citizen participation in decision-making. However, they sometimes rely on old paternalistic structures and seek representation through intermediaries (often men), who can be manipulated or co-opted, and who act as gatekeepers to block the participation of less powerful groups within the community, such as young people and women.
- National policies tend to focus on relocation/housing policies, work/welfare programmes, health and education or self-government structures for marginalised groups – which may be well-intentioned but in practice can trap or push people into servitude, political disempowerment or segregation.

Lessons for practice:

- Segregation can be by design or default. Often, it is difficult to tell the difference but examining the details of how policies are arrived at can shed light on the motivation behind these policies, resulting in different strategies to address their shortcomings.
- Approaches to funding and managing education can facilitate social inclusion when they also work to build community cohesion and address stigma and discrimination. Such approaches need political buy-in at national level, or funding from alternative sources that enables the piloting and demonstration of innovative approaches.
- Practitioners and duty-bearers need to learn to value local knowledge. This may be difficult for them to access; because there are few spaces in which it is shared, and because it is not valued. Inclusion programmes should provide opportunities for Roma (or other marginalised groups) to share their knowledge in ways that are participatory and which address power imbalances in knowledge production and communication.
- Citizens need support to become able to communicate their actual situation and their needs to duty-bearers. Otherwise, important knowledge about their reality can be lost or distorted.
- People in local authorities and organisations tasked with facilitating social inclusion may need training to value the knowledge of the people who experience the issues. A good place to start is to reflect on how stigmatised groups are viewed by mainstream society and in policies, and how their problems are constructed in policy-making.
- Building the individual and collective capacity of people experiencing intersecting inequalities can require navigating their relationships with more powerful members of their (e.g. ethnic) group, who may act as gatekeepers and claim to speak for them.
- NGOs can pilot approaches to building social inclusion and carry the risk (of failure) so that local government can take up an approach that has been demonstrated to work.

1 Introduction

Inclusion means being able to be present in society with full rights. Exclusion is its opposite and can be of many kinds, it is psychological, societal, social, political and economic, and for me, these together make up total exclusion. It's like they pick out one of your personal characteristics and these become the excuse for keeping you away from social goods. Of course, you can be included on paper, as if you have those rights in law but in reality you are completely excluded. Because the decision makers and the majority population is immune to the issues that you struggle with.
(SJ, Roma activist, Hungary)

Inequality has moved centre stage in domestic as well as international development discourse in recent years (Piketty 2014; Wilkinson and Pickett 2010). Reducing inequality and the urgent need for inclusive policy-making also frame the Sustainable Development Goals (SDGs). SDG 10 calls for 'reducing inequality within and between countries' and the United Nations has pledged 'that no one will be left behind' (United Nations, undated). These commitments have universal resonance and challenge donors to scrutinise the coherence of their domestic and foreign policies, as well as the effectiveness and transformational potential of development interventions. The World Social Science Report (WSSR) for 2016 identifies seven priorities for action among the social science community, including funders. This paper responds to the first priority, to 'increase support for knowledge production about inequality, and processes of social inclusion and exclusion, in those places most affected by them' and the fourth priority, to 'deepen our understanding of how multiple inequalities are created, maintained and reproduced' (ISSC, IDS and UNESCO 2016: 31).

Our main empirical focus in this paper is Roma inclusion. Advocates for the inclusion of Roma in mainstream society have recognised recently the fundamental role that inequality plays in keeping Roma populations subservient; they point to the structural discrimination against Roma (by turns called 'antigypsyism' or 'Romaphobia') as the 'continuous headwind' that frustrates efforts at inclusion (Alliance Against Antigypsyism 2016). There is a newly emerging understanding that chimes with the SDGs that 'the hierarchy implied by antigypsyism reflects structural inequalities of power. Roma and associated groups find themselves in positions of relative powerlessness – materially, politically, but also culturally' (*ibid.*). This means that Roma inclusion work needs to engage both with the institutions and processes that perpetuate antigypsyism and with the normalised attitudes or 'social norms' that keep it in place.

We argue in this paper that the intersection of inequalities needs to be better understood, and we seek to contribute to this effort especially as it relates to Roma inclusion work, recognising that this is an area that could benefit from insights acquired in other geographical and conceptual spaces. This paper is produced with the support of the Swiss Agency for Development and Cooperation (SDC)'s Democratization, Decentralization and Local Government (DDLG) division.

This article is a collaboration between two co-authors. Violeta Vajda has been working for the past three years to support Roma activists in developing their capacity for grassroots issue-based advocacy in Hungary. In the process, she has collaborated with a number of Roma-led activist groups, which have become increasingly aware of, and have organised to oppose, multiple discrimination and antigypsyism as it relates to local government policies that marginalise Romani citizens. Jo Howard is based at the Institute of Development Studies (IDS) in the UK, and works with partner organisations in India, Egypt, Ghana, South Africa and Uganda on participatory accountability and the processes through which marginalised groups are developing accountability relationships with duty-bearers.

Together, we have also been supporting SDC in the Western Balkans and Central and Eastern Europe (CEE) over the past three years on the theme of social inclusion in their work with Roma. In the process, we have both learned a lot and sought ways of overcoming a range of specific challenges connected to this work. We research – and reflect upon – power and privilege, and we support the growing movement for a more critical understanding of what it is to be privileged.

Privilege is understood as the relative advantage or an 'invisible knapsack of assets' (McIntosh 1990: 30) conferred on groups who hold power in society. Extrapolating from gender privilege, it consists of a complex interplay of sociocultural and representational, material and institutional, ideological and political, and epistemological dimensions, but also those relating to recognition of identity and history (Edstrom, Singh and Shahrokh 2016: 59). As we show elsewhere (Howard and Vajda 2016), in the context of Roma inclusion this privilege is akin to the power of white people over those targeted by racism and, like gender privilege, is hidden under a blanket of denial:

> The invisibility of (e.g.) white positionality is the product of a lack of acknowledgement of the historical processes which have created privilege and the social norms which maintain this advantage: [W]hiteness has long reserved the privilege of making everyone but itself visible, lest it be exposed as a position within a constellation of positions.
> (Leonardo 2002: 41)

Starting from this theoretical framework, and with particular regard to Roma inclusion in Central and Eastern Europe, and with illustrations of structural discrimination in other settings, this paper aims to:

1. understand how exclusion is produced through *intersecting* inequalities, and is rooted in social relations within and between families, communities and decision-makers
2. understand how power operates through these relations and the barriers and disincentives for duty-bearers to be inclusive, and why duty-bearers and development professionals should make it a priority to engage with the concept of power
3. identify effective approaches to addressing inequalities that local governments, civil society organisations (CSOs) and activists can adopt to transform power relationships, address privilege and promote inclusion.

While our work together has focused on Roma inclusion and discrimination, in this paper we also bring in evidence from Jo's work on marginalisation and inclusion in Ghana. The additional case material we believe adds an understanding of intersecting inequalities as a universal issue and the role of gender discrimination in exacerbating inequalities, but also highlights how the issue is particularly acute with regard to Roma in Europe, due to the complex history of discrimination.

1.1 Structure of the paper

Section 2 discusses the key concepts relating to inequalities and their intersection, and how inequalities are compounded by discrimination, which in turn drives exclusion and undermines people's agency. A power lens is introduced to discuss discrimination and our framework argues that an increased understanding of discrimination, power and privilege can improve policy-making and programming for social inclusion. **Section 3** explores how policy approaches taken by duty-bearers to address discrimination can drive intersecting inequalities. **Section 4** illustrates such policies and their consequences through an example of Roma relocation in Romania. **Section 5** uses a power lens to explore in more depth both

the macro- and micro-level processes that undermine or prevent inclusion of the most marginalised, and **Section 6** focuses on effective approaches. **Section 7** concludes the paper and summarises the key recommendations. Throughout, we draw on our recent and ongoing research, in particular on Roma inclusion and with Roma activists in the Western Balkans and CEE, but also with marginalised communities in Ghana.

2 The challenges of intersecting inequality, discrimination and power: concepts and framework

2.1 Inequalities and how they intersect

The World Social Science Report (ISSC, IDS and UNESCO 2016) identifies seven different categories of inequality, each profoundly detrimental to people's wellbeing and development, and often mutually reinforcing (Kabeer 2014). The first category is economic inequality, which was for many years the principal if not only measure of inequality. This relates to economic deprivation of various kinds such as income poverty, insecure livelihoods or asset deficits. Solutions are sought through improving access to education and employment, and increasing the redistributive capacity of taxation. Economic inequality is measured by ranking individuals and households in terms of their income or wealth, and is a *vertical* measure of inequality that suggests a hierarchy of wealth. While these aspects are fundamentally important, they can miss or underestimate the role of power relations in maintaining inequality (Rowlands 2016).

The WSSR draws together the diverse literatures on inequalities to identify six additional categories: social, cultural, spatial, environmental, political and knowledge inequalities. These inequalities interact and drive each other. Social inequalities such as reduced access to quality education are deepened through spatial inequality, and drive knowledge inequality.

> Social, knowledge, cultural, spatial and economic inequalities in turn shape civic and political participation, thereby intersecting with forms of political inequality. Social and economic inequalities affect the capacity of people at the bottom of the distributions to mobilize, weaken group-level cooperation and coordination, hamper their capacity to engage in social and political decision-making processes, and reduce their trust in institutions.
> (WSSR 2016: 38)

Historically, inclusion policies (at least in the area of Roma inclusion) have focused on economic and social inequalities, and sometimes spatial, but have left out in particular political inequalities, which means that people have not had the political power to make changes. Further, social inclusion interventions aimed at reducing the inequalities experienced by marginalised groups can suppress the political dimension by constructing their situation as a social issue, thus ignoring who holds the power and why, and depoliticising the issue (Vincze and Rat 2013). The case of Roma discrimination, which we highlight in this paper, evidences how 'cultural inequality' is not an appropriate or sufficient label for their situation and depoliticises the historical marginalisation of Romani communities.

In this paper our focus is discrimination based on marginalised identities, which, we argue, drives other forms of inequality, and must be addressed if social inclusion programmes are to succeed. Thinking about inequalities in terms of identity-based discrimination maps onto

the concept of difference suggested by Fincher (WSSR 2016: 74) for 'powerful thinking about the grounded production of justice and injustice, and of inequalities', such as that which Roma across Europe have engaged in through various citizens' movements including Roma Pride (McGarry 2017: 171). By focusing on discrimination based on marginalised identities, we pay attention to the power relations exercised through social norms and values, which position certain groups as less deserving of respect and lower down the social hierarchy than others. Identity-based inequality relates to groups rather than individuals, and cuts across income categories in what is sometimes described as *horizontal* inequality, which assigns greater value or status to some social groups than others (SSC, IDS and UNESCO 2016[1]). It is important to note with Kabeer that 'the most enduring forms of group-based disadvantage are associated with identities ascribed from birth such as race, caste and ethnicity' (ISSC, IDS and UNESCO 2016: 55). Gender further exacerbates disadvantage within socially marginalised groups, with women usually experiencing greater disadvantage across all the inequality categories than men within their identity group.

Recognising the power of discrimination helps us to see how and why the different forms of inequality *intersect,* producing the often intransigent nature of certain poverty traps, and their persistence across the lifetime of individuals and even across generations (Burns *et al.* 2013). Where these inequalities overlap with each other, 'they give rise to an intersecting, rather than an additive, model of inequality, where each fuses with, and exacerbates, the effects of the other' (ISSC, IDS and UNESCO 2016: 58). This means that one form of inequality can drive or deepen another. People whose identities are culturally devalued are more likely to experience economic and spatial/locational disadvantage and are also likely to lack political representation. It is the intersection of these disadvantages that produces persistent and intergenerational poverty (Paz Arauco *et al.* 2015) and, most importantly, **further entrenches perceptions that the marginalisation of certain groups is justified. The intersection of multiple disadvantages tends to confirm the perception that it is the fault or responsibility of the marginalised group, household or individual to be in such a situation, since the causal links between the different disadvantages are, to a large extent, invisible or not even thinkable.**

Research into the dynamics that hold people in poverty and marginalisation has identified the visible and invisible power of discrimination and stigma, which work across different social cleavages such as gender, ethnicity, age, ability and sexuality and intersect in the lives of individuals and groups in complex ways (Burns *et al.* 2013; Collins and Chepp 2013; Shahrokh 2015; Edstrom *et al.* 2016). Furthermore, these dynamics are embedded in relations within families and communities and in local informal and formal institutions, as well as even in people's minds and ways of operating (see Section 2.3 on 'invisible power' below).

Inclusion initiatives tend to focus on social and economic inequalities and promote access to employment and services. While these are valuable, they can fail or fall short of transforming structural discrimination if they do not also consider knowledge and political inequalities and address the barriers faced by discriminated groups to have voice and be represented in decision-making arenas. Inclusion policies that encourage citizen engagement are therefore critical.

However, people who experience intersecting inequalities are likely to approach invitations to be 'active citizens' with some caution, and will not expect power to be handed to them. As Pettit (2016: 90) observes, 'citizen engagement is shaped by what I would call *civic habitus*

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[1]   Frances Stewart argues that 'Horizontal inequalities are inequalities among groups with a shared identity. They constitute one of the most important types of inequality, notably because of their implications for justice and social stability, where relevant group categories include among others race, ethnicity, religion, class, gender and age' (ISSC, IDS and UNESCO 2016: chapter 7).

(after Bourdieu 1980): the tacit, rational collusion with socialised norms of power in order to survive and evade harm'. Passivity and subservience are behaviours that have emerged over generations of structural discrimination (towards women, Roma, the poor, indigenous groups, etc.) as a survival strategy, and while it may seem logical at the time, it is not so easily abandoned in the present. People don't simply 'choose' to become active as citizens – they assess the 'costs and consequences' of their choices' (*ibid.*). For this situation to change, the onus is on those who are privileged, as well as those who are marginalised.

In this paper therefore we ask: if duty-bearers are truly interested in encouraging marginalised people to actively work for the development of their communities, what can they do to shift their own way of thinking that would encourage that engagement? In particular, how can they engage with the concepts of intersecting inequalities and create policies that seek to address rather than perpetuate them? In seeking to answer this question, we foreground political and knowledge inequalities, because our respondents are clear about the primary importance of these in their lives and we see this as an important area where power differentials need to be addressed before other inequalities can shift.

2.2   What is discrimination, and why do we need to understand it better?

Discrimination takes place when a group of people are treated differently because of prevalent social attitudes towards a particular characteristic that members of this group share, and that cannot readily be changed – in particular, gender, ethnicity, age, disability, and sexual orientation. Discrimination takes place within the household, the community and more widely. It defines people's experience of their own identity and citizenship through multiple and complex interactions *horizontally*, with family members, and with other groups of citizens in the community and between communities. Discrimination also takes place through *vertical* relationships, when policies exclude certain groups from economic benefits or access to services, or when service providers behave in discriminatory ways towards certain groups of people.

Discrimination thus connects with and exacerbates the inequalities described in the previous section. It is experienced as intersectional, which means that it operates on the different and various identities that people hold, and interacts with the economic, spatial and environmental circumstances of their lives. People are thus disadvantaged and at the same time judged by unthinking outsiders for their poverty, living conditions, employment status, 'choice' of home and also for their ethnicity, sexual orientation, gender, ability or age. This judging is often unconscious, because it is fuelled by social norms that have become invisible to us since they have been normalised over generations of practice: for example, norms that relegate women, ethnic minorities, people with disabilities or people living in poverty to an inferior status. Alternatively, intersectionality can become a useful lens that can help discriminated groups to build solidarity and create a wider platform for action; for example, 'it can help men (and women) perceive and understand the "structure" of gendered oppression in a deeper way, connecting it to other forms of identity-based oppressions, based on class, caste, age and religion' (Edstrom *et al.* 2016: 68).

It is because of the way in which discrimination interacts with inequalities that people can come to internalise inequality. This means that they begin to believe that their own position in the world is necessarily lower than that of other groups. This process erodes self-confidence, self-respect and the belief that you can do something to make a change. Yet, as we show in Section 4 through stories of activists, discrimination can go both ways: historically it can erode confidence but once understood (e.g. through a deeper reflection on power and intersectional oppression) it can lead to resistance. In other words, **discrimination, tacitly accepted and not addressed, is corrosive. Once acknowledged, processed and resisted, it can become a driver for change – not just for the marginalised but also for the powerful.**

It is often difficult for development practitioners, local government officers, non-governmental organisation (NGO) staff and others who do not belong to these marginalised groups to comprehend how these disadvantages can compound with each other and reduce not just people's sense of agency but also the space in which one can use it. Discrimination is often invisible to those that do not experience it because it simply does not happen to them: a non-Roma person will never be refused entry into a nightclub because of their ethnicity; someone who is born and raised middle-class will not usually have relatives who die early because of entrenched poverty; a man in rural Ghana will not be denied voice in decision-making spaces because of his gender; a non-indigenous person in Bolivia will not be refused treatment or verbally abused by health professionals because of their ethnicity (Burns *et al*. 2013). Indeed, sometimes maintaining a position of privilege relies on not noticing the wider inequalities around us – for example, when non-Roma workers who were not wrongfully accused of stealing in their workplace 'brushed off the incident, whereas the Roma worker who was accused, was unwilling to return to his job for fear of being branded a criminal' (M, Mayor of Ny, Hungary).

However, duty-bearers are often in a middle agent position where they have to notice inequality since it is their job to do something about it; yet they find themselves without the knowledge and the resources to do so effectively and without the necessary support from the wider society, and are often the object of criticism from both marginalised people and the majority population. We [the local authority] tried to make all kinds of technical and staff improvements in the segregated school to entice parents to bring their children here, but we couldn't compete with that one fact, that their children would then be educated alongside Roma. That was, as you say in card games, the ultimate trump card, the deal breaker (M, Mayor of Ny, Hungary). This paper seeks to open up that discussion and provide some assistance to hard-working practitioners at the local level, to help them to better understand the enormous challenges placed on their work by intersecting inequalities; as well as to point to some policies that have been effective at local level in addressing these challenges in different geographical locations.

For those of us working in situations of institutional privilege, it is difficult to be aware of the power relations that reproduce inequalities and our own positionality in these complex relationships. Taking an intersectionality approach means that we pay attention to how a group which is marginalised because of its identity (ethnicity, caste, etc.) is also experiencing economic, spatial, environmental, political and knowledge-based disadvantage – and how these are connected. Because of the multiple and intersecting drivers of marginalisation, there is a risk that policies will address some aspects but ignore others, and in so doing may exacerbate rather than improve people's situations. Unless discrimination becomes our focus and we understand and work with these intersecting challenges, our interventions are unlikely to promote sustainable social change, and additionally will frustrate and block our well-meant efforts to make a difference. This is illustrated by the following example from West Africa.

In order for policies to effectively address inequality and exclusion and make lasting improvements in people's lives and communities rather than trying to fix a symptom, we believe that policy-makers would benefit from tools to understand how discrimination operates, and how different forms of inequality intersect. The example of the Ada women in Box 2.1 demonstrates how interconnected the issues are, the multiple interests and perspectives, and how the women in this marginalised rural community experience multiple and intersecting inequalities. To address their marginalisation requires looking below the surface and addressing discrimination and its impact at the personal and group levels, and also at the level of system and society. It also means addressing the power relations and assumptions embedded in local government itself (formal and traditional), and the way it frames 'the problem'. **Using an intersectionality lens can help policy-makers to design**

more effective social inclusion strategies because they bring a more nuanced understanding to addressing discrimination, particularly when used alongside power analysis.

Box 2.1 The intersection of economic, spatial and environmental inequalities with identity-based and political inequalities

The Songor lagoon is West Africa's largest salt-yielding lagoon, and artisanal salt-winning is the main livelihood activity of the surrounding Ada communities, following a 400-year-old artisanal practice. Salt is a fundamental part of economic life and also the identity of the Adas: 'E yoe ngo?' (do you chew salt?) is how one asks if a person speaks Dangme, the Ada language (Langdon, Larweh and Quarmyne 2014).

Historically, the resource was managed in a communal way, with anyone permitted to win salt, so long as they gave some to the traditional custodians of the lagoon (Manuh 1991). Women in particular were able to supplement their income from farming during the dry season by winning salt and selling it at the local market. This income ensured food security and education for their children. But in the 1980s, large parts of the lagoon were privatised, resulting in violent conflict between local salt-winners and the companies, and causing the death of a pregnant woman.

The government changed policy direction and a plan emerged to improve artisanal salt-winning, but this has not been implemented. Small-scale privatisation continues, where the edge of the lagoon has been carved up into small private salt pans – known locally as 'atsiakpo' (Langdon and Larweh 2015). Women's livelihoods have been most affected by this threat to communal salt-winning, yet women have been excluded from the decision-making process, in which local and national officials have used their positions to sponsor the production of these private pans. Women now have to work on other people's salt pans, and their income – which is crucial to household food security – is reduced. The salt resource is dwindling due to the more intensive extractive approach of the atsiakpo salt-panners, who channel water out of the lagoon to maximise their production.

For example, in the community of Ny (Hungary) that we refer to throughout this paper, the mayor has developed a more nuanced understanding through a range of factors. He had worked as a team leader in the public works programme and engaged on a daily basis with disadvantaged Roma people caught in this unfair system (which he describes as a modern form of slavery). Prior to working in the public sector, he had supported civil society-initiated projects to make the environment of the Roma fit for living. When elected, the mayor brought a good understanding of Romani issues and activism in his city, and was receptive to the proposals of a local Romani women's activist group (working in partnership with international donors and international NGOs) to open up a dialogue between citizens and the local authority. Under his leadership, local authority policies have developed to a point where they open up meaningful employment and early education avenues for local Roma. This is confirmed by our interview with the activists, and also by many subsequent conversations with citizens in the locality. It is the mayor's insight into the need to address poverty *and* discrimination that has driven this policy shift, and this insight has come about through a long learning process that has led him to understand the complex interrelations between the different pressures that his citizens face (state-segregated education; national policies of employment that are exploitative; tensions within the Roma informal segregated settlement; etc). Added to this, his relative independence is important (he does *not* represent the ruling ultra-conservative party and can bring forward policies that favour social inclusion rather than following the party line). The relationships he established before being elected, with a number of actors who hold various forms of power (not just businesses wanting to move into the area, but also staff in the local authority, activist groups, local Roma-led NGOs, international CSOs and local schools), have also proved important.

2.3   Why use power analysis

An understanding of power, and how inequalities are perpetuated through power relations, is essential for local government and other development practitioners to intervene effectively to promote social inclusion. What is particularly important, according to our interviewees, is for practitioners to show 'intellectual curiosity' and learn to value local knowledge: 'I don't think they put enough efforts to understand the cause [of marginalisation], so they will be able to do it [inclusion programmes] well' (J, Roma academic, Serbia). On the other hand, it can be difficult for duty-bearers to access local knowledge, partly because there are few spaces in which this knowledge can be shared, and partly because this knowledge is not valued. Power analysis can help in understanding the drivers of discrimination and marginalisation, and also in identifying solutions. However, it needs to take us beyond a simple binary of those who have power versus those who experience 'the problem', towards an understanding of relationships between the powerful and the less powerful as complex and nuanced (Haugaard 2012). These relations shift and are renegotiated in different spaces, and a less powerful group can gain more power through occupying new roles and in new spaces (Schneeweis 2016).

It has only recently become widely accepted in development circles that 'power lies at the heart of change' (Green 2016) but the application of a more complex and nuanced understanding of how power operates in different settings is still a work in progress (Rowlands 2016). It is even more so in the area of Romani inclusion work where most interventions are paternalistic (Rostas, Rövid and Szilvási 2015), while at the same time on the part of Roma activists and academics there is 'a desire for new directions, to give Roma a greater say in their lives, and to bring reality to the rhetoric of empowerment… to reflect on the need for new dynamics in power relationships within governmental and civil society decision-making processes' (Bogdán *et al.* 2015).

The visibility of power in human relations has been debated extensively. Bachrach and Baratz (1962) broke new ground by identifying two 'faces' of power: one visible and observable face; and one hidden, which operates through the 'mobilisation of bias'. This hidden face of power establishes 'the dominant values, the myths and the established political procedures and rules of the game', which benefit some groups and marginalise others (*ibid.*: 952). They also suggested that 'non-decision making' needs to be observed, which is the hidden power which can 'limit the scope of actual decision-making to "safe" issues… the restrictive face of power', and how this power limits participation in decision-making (*ibid.*). Land (2015: 198) highlights this passive aspect of holding power, explaining it by the fear of the decision-maker who 'knows enough to be aware of the possibility of getting into a political mess, yet does not know enough to navigate the situation'. The result is non-action: 'the strategy is to stall, to end up doing "nothing", which is essentially a form of passive aggression' (*ibid.*).

Steven Lukes (1974) built on and extended Bachrach and Baratz's work, and identified power as having three dimensions: (i) that of overt decision-making or coercion; (ii) the power to influence the agenda or structural bias; and (iii) the unseen power of dominant ideology. These three dimensions were later helpfully described in terms of 'visible', 'hidden' and 'invisible' power by VeneKlasen and Miller (2002), terms which subsequently have been widely used for their accessible way of conveying how power *over* operates. Lukes' particular contribution is his insight into the third dimension of *invisible power,* which we discuss at more length here, because it helps to explain how the marginalisation of some identities takes place and is perpetuated. Invisible power describes how social processes create and perpetuate inequality by shaping the boundaries of what is felt to be acceptable, normal or possible (Hayward 2000). Moreover, invisible power 'shapes people's beliefs, sense of self and acceptance of the *status quo* – even their own superiority or inferiority' (VeneKlasen *et al.* 2002 in Gaventa 2006: 29).

By shaping the way in which visible and hidden power are maintained, invisible power effectively underpins *enduring* inequality and exclusion, through intersecting cultural beliefs, social norms and ideologies, which, when operationalised, translate into policies that create rather than reduce inequalities across the seven types. This happens because dominant beliefs create and *normalise* hierarchies and exclusions (as well as inclusions) and can legitimise service providers to behave in discriminating ways towards those already experiencing hardship at the same time as these service providers feel that they are doing all they can to address these exclusions. An example from the film of Pata Rât[2] is where duty-bearers in local government complain about Roma people 'living in extremely insalubrious conditions' on Coastei Street; the solution to which is to hide the problem by evicting them to the garbage dump where they are not just economically, socially but also spatially marginalised, environmentally compromised, their cultural identity and knowledge devalued, and their capacity and opportunity for civic and political engagement severely limited. It is important to understand that the local authorities in this case were not motivated to integrate or include the Roma in the urban space by humanitarian or social policy principles, but from a desire to ensure the market value of properties on Coastei Street and to put an end to what they saw as illegal settlements of Roma in various parts of the city. (Dohotaru, Harbule and Vincze (2016): 44-5). Thus in 2010, in spite of a number of petitions and demands from CSOs to take into account the rights of Roma to decent housing, work and education, also with reference to the demands of the Decade of Roma Inclusion, the city authorities went ahead and implemented their policies, including forced evictions of Roma families from Coastei Street. This toxic combination of inequalities can profoundly undermine people's belief in their own agency, and their trust in others that enables them to take collective action.

The power of self-belief ('power within') and the power of organising for collective learning and action ('power with') are expressions of power which can be built within and between marginalised groups to enable them to challenge discrimination (VeneKlasen and Miller 2002; Rowlands 1995). Viewed in this way, power analysis points to the solutions as well as helping to explain the problem. There is evidence that certain development approaches can facilitate these kinds of positive power, and that these need to be rooted in analysis of the causes and drivers of the structural discrimination that underpins state policies and normalises inequalities. Yet, the power of norms and how to shift them are 'too little attended to in development circles' (Green 2016: 31). As a result of development interventions, 'many people's lives have improved significantly, but the power dynamics that maintain poverty and inequality are clearly still firmly in place' (Rowlands 2016: 129). A consequence of not attending to them is that persistent and systematic discrimination and marginalisation are reproduced in political structures and representation, and stigmatised groups become disenfranchised and lose trust in the political system.

In sum, we have clarified here that we support the WSSR's expansion of the concept of inequality to include seven types, instead of the three types of inequality that have dominated development literature in recent years (economic, social and spatial). Persisting inequalities in these seven dimensions are caused by unequal relations between people, and therefore to understand them and how they intersect, power analysis is a helpful tool. Power analysis enables us to perceive the drivers of inequalities rather than only their manifestations, and in particular how discrimination acts as a cross-cutting driver of multiple and intersecting inequalities and exclusion. We argue that it will not be possible to shift inequalities in the long term without addressing discrimination, but discrimination is given insufficient attention in development interventions because it is often 'invisible', difficult to conceptualise, and consequently difficult to develop and operationalise strategies to change it. It is also politically charged, and involves the attitudes and behaviours of development professionals as well as the groups targeted in project interventions. In the next section, we look at inclusion policies and how they fall short if they do not shift discriminatory norms and behaviours.

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[2]   www.youtube.com/watch?v=mzQe8l2CmAY&app=desktop.

3 Why policies fail to address discrimination if they do not address inequality and power

In this section, we explain the direct and indirect policy approaches taken by duty-bearers to address discrimination, and argue that, in fact, both approaches will be limited unless they are also sensitive to and address intersecting inequalities. Policies cannot focus only on the manifestations of the problem – they must also address the underlying structural inequalities and embedded social norms that feed discrimination. Understood in this way, it becomes clearer that to address inequalities requires addressing discrimination head-on, and that this can only be achieved when the knowledge and agency of marginalised groups are recognised and upheld by duty-bearers. But duty-bearers are not always aware of the need to engage with these groups; in such a scenario, what are the first steps that need to be taken?

According to Stewart (ISSC, IDS and UNESCO 2016), there are two kinds of policy which address discrimination: direct and indirect.

Box 3.1 Direct policies to address discrimination

Direct policies: affirmative action, which target deprived groups – for example, by giving preference in employment and education or political representation.

One such example we have researched is the proposed Chance for the Future employment generation programme in Ny (Hungary), initiated by the local government, and personally by the mayor of Ny. It relies on the local authority signing a series of agreements with firms seeking to invest in the city that commit investors to train up a certain number of marginalised (in this instance, Roma) citizens. However, I said [to the companies], you cannot ask people to work for you after the training is finished, because that amounts to forced labour, which is something we are trying to get away from (interview, mayor of Ny). The programme includes plans for personal mentoring of those who enter the 'open' workforce for the first time after participating in government-sponsored public works programmes only. This kind of training and mentorship programme is warmly welcomed by the local Roma activist group, who proudly note that they think it was their idea in the first place and that they have seen it work well elsewhere. My son was trained through a similar apprenticeship as a stonemason and that was a very useful skill, you can even go abroad with it and work for a lot more money.

However, such policies require a supporting national consensus and a deeper understanding by non-Roma politicians of the complexities involved, if they are not to provoke hostility among more privileged groups. This was the fate of the major European Union (EU)-funded Bridge to the World of Work programme initiated by the National Roma Minority Self-Government in Hungary, which failed due to the internal corruption and incompetence of the organisation handling it, but also the negligence of central government (Kovács 2015). Decision-makers failed to understand the tensions that were created within the Roma organisation by taking on such a big programme, and some (Daróczi 2017) say that the government cynically allowed the Roma Minority Self-Government to fail while nominally showing its 'support' for the Roma community. Missing elements from this programme included: sufficient checks to ensure that the implementing agency had the capacity to handle the proposed work; an open tender process to select the implementing agency; and any measures to educate the majority population about the purpose and details of the programme, to gain their support for it.

Stewart warns that direct policies also need to be comprehensive, addressing a range of deprivations, since unidimensional interventions are unlikely to be effective. She gives the example of Malaysia, where such policies were introduced comprehensively after riots in the

late 1960s, to facilitate the inclusion of the indigenous Malay population. Stewart argues that, although these policies are increasingly opposed by the richer Chinese group, strong interest in their maintenance is making it difficult to end them (ISSC, IDS and UNESCO 2016: 53). Affirmative action policies need to be accompanied by supporting measures such as mentoring, which prepares people to be effective in environments from which they had previously been excluded, and where they will be in a minority, and may also face increasingly overt discrimination from the majority population. An Albanian Roma activist described how she heard herself referred to as 'the monkey' when she started working in a government institution (pers. comm. Tirana 2016). Mentoring is crucial to help people from stigmatised groups to deal with the backlash from majority groups when inequalities begin to shift.

The second kind of policy to address discrimination is indirect – that is, universal policies which benefit all, but can be used to reduce inequalities between groups (see Box 3.2). These policies require a strong legal system and the commitment of duty-bearers to enforce them.

Box 3.2 Indirect policies to address discrimination

Indirect policies: are universal policies which, by design, benefit poorer groups disproportionately. Where poorer groups are regionally concentrated, policies to promote the development of poorer regions generally reduce horizontal inequality. Progressive taxation, and policies targeting resources towards lower-income individuals, also do this. These policies work more slowly and with greater leakage in terms of reducing horizontal inequality. But they have the advantage of reducing vertical inequality as well. Anti-discrimination legislation is another general policy for reducing horizontal inequality, but it requires a strong legal system for enforcement, which makes it less suitable for many developing countries. It was an important contributory factor in reducing horizontal inequalities in Northern Ireland. Effective reduction of horizontal inequality may require a combination of direct and indirect policies, as exemplified in Malaysia, Northern Ireland and South Africa.

Source: ISSC, IDS and UNESCO (2016: 53)

Effective policies to address discrimination are underpinned by appropriate theories of change. These theories of change are likely to be multi-stranded, working simultaneously on vertical and horizontal inequalities in partnership with activist groups, NGOs and government institutions. These theories of change will also embed policies in a longer and deeper process of transformative social change.

In defining social inclusion, the World Bank (2013) highlights it as a 'process of improving *the terms* [our emphasis] for individuals and groups to take part in society'. However, interventions for social inclusion are currently focused on several related aspects of visible exclusion (housing, education, health and employment). The lack of attention to the terms of inclusion means that policy-makers are ignorant of (or choose to ignore) the trade-offs involved for those who take up the offer of improved housing, in terms of their access to employment, family support, decent education, health, etc. (Burns *et al.* 2013). Because of this lack of awareness of how a change in one policy area can affect others, or how well-meaning policy changes are affected or even negated by the effects of invisible power relations, social inclusion interventions may, in fact, perpetuate marginalisation. For example, a Roma man accepts a good employment opportunity on the 'open market' rather than stay 'safe' but underemployed in his segregated community, only to be faced with more overt antigypsyism in the workplace; a bright young Roma student enrols in the best high school in town whereupon he is faced with racist taunts and a discriminating school system, and he chooses to leave (see stories of Ny residents and R below). Other forms of trade-offs have been created by ill-designed social protection policies, which trap people between

trying to get an uncertain job that they might soon lose due to discrimination, and losing social benefits that are their only reliable income. If they choose the relative safety of the benefit, they are stigmatised as 'work-shy'. Such trade-offs keep multiply disadvantaged and discriminated groups in poverty and inequality traps.

Thus, in the case of both direct and indirect policies, their impact will be limited unless they also address the intersection of inequalities, which means that discrimination in one area (e.g. social) needs to be considered in conjunction with its manifestations in other areas (e.g. spatial, political, economic). The institutionalised forms of discrimination which are perpetuated and normalised through social norms will not be removed by legislation alone. And even when policies are designed with elements to promote inclusion, by themselves they will not work without addressing the underlying inequalities of power and voice. Furthermore, if the status quo means that some groups are systemically excluded and devalued, this equilibrium cannot be shifted without a process that enables these groups to build their power and voice.

The reason for this is often what we have previously defined as hidden and invisible forms of power, which are consolidated by their interaction with the more explicit and overt inequalities such as spatial and environmental disadvantage. As explained earlier, we understand discrimination as taking visible and hidden forms, but its most insidious and hard-to-shift mode is 'invisible power', which operates through formal and informal institutions and relationships, 'sits in people's habitual ways of thinking and behaving' and needs to be challenged in order to address the wider power relations between development actors (Rowlands 2016: 127). Yet these relationships are rooted in social norms and therefore often difficult to see, let alone to challenge.

By ignoring the intersection of different forms of inequality, we make invisible the power relations that underpin policies and that perpetuate, for instance, beliefs about capabilities and tendencies, as well as unquestioned institutional norms of economic, cultural and linguistic usage. As such, interventions can risk being paternalistic with a tendency to assimilate rather than enable integration with respect for difference – which would shift the *terms* of inclusion (Acton and Ryder 2015). There is a risk that these more paternalist kinds of policy approach can constrain agency and undermine the group or community's organisational and mobilising capacity, without which there cannot be a transformation of the terms of engagement. It is therefore critically important to support marginalised groups themselves to develop the inner confidence and self-belief (power within) and a sense of collective capacity and rights (power with) to raise their political voice.

Development practitioners have a role in this process, through supporting individual and collective reflection and action, building confidence and capacity in these groups, and supporting them to organise and engage with policy-makers and gain political representation. These processes must underpin and should precede social inclusion interventions if they are to truly transform inequalities. Often, well-organised local citizens' groups can take advantage of the opportunities of living in a community over a long time to bring about transformative change that neither political actors (e.g. local governments) nor other institutions (e.g. NGOs) can follow through, because they are constrained by political or project cycles. The challenge for external agents then, is to act as facilitators or enablers so that citizens' groups can recognise their own unique power to bring about such changes, to continue to support these groups to not become dispirited by the project or political cycle and relinquish that power, and to encourage them to use that power to the benefit of the community over the long term.

In order to play this enabling role, local politicians and NGOs can benefit from learning to recognise and value the intrinsic knowledge and power that marginalised citizens possess, and to work with this knowledge. As such, inequalities of knowledge and power must be addressed as a precursor to addressing other inequalities and promoting inclusion. Yet (and as alluded to in Section 2.2), it is a big challenge for local government to access and value local knowledge. A Serbian Roma academic suggests that policy-makers can be proactive in this respect – for example, by seeking out Roma academics connected to grassroots organisations or by putting in place particular structures to access local knowledge:

> *It's difficult because I don't think there are a lot of spaces for getting the knowledge, you know, for having the knowledge exchange. I don't think there is a space for this because all the trainings and things are not very high quality… a lot of people's discourses were based on prejudices about Roma when it comes to trafficking.*
> (Roma academic, Serbia)

She felt that her own research could contribute valuable knowledge, but policy-makers would not seek her out because they do not consider Roma as knowledgeable.

To sum up, a better understanding of how discrimination operates through power relations can enable local authorities to see and address intersecting inequalities, and find ways to challenge and transform these relations. Since duty-bearers are often not members of the marginalised groups themselves, they need to work with these groups to access local knowledge and to develop theories of change, strategies and policies in collaboration with them. By starting from the lived realities of those who experience intersecting inequalities and by working with them, local authorities will be better placed to notice and work with emergent opportunities for change, and to avoid or stop any programme that is having adverse impacts on the lives of marginalised groups.

4 How disadvantaged people experience state inclusion policies

In Section 2, we provided some conceptual tools for understanding how discrimination interacts with inequalities to drive exclusion. In this section, using a well-known example of spatial segregation from Romania, we analyse a story of exclusion using our conceptual framework. We try to identify the role of power relations and intersecting inequalities, and the role of the powerful in these processes.

There are multiple examples of slum clearance and relocation policies that have served to further marginalise vulnerable groups because of duty-bearers not noticing or ignoring the inordinate amount of power they wield over their disadvantaged constituents. Managing urban development is a huge and complex challenge for local authorities, and may also require the political will at national level to stimulate local and regional development. In the absence of joined-up macro policies,[3] marginalised groups will often move to the city where they can escape some of the stigmatisation they experience in smaller communities, and where there are more opportunities for income generation. People often prefer to stay in

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[3] Kabeer, in the World Social Science Report (ISSC, IDS and UNESCO 2016), suggests that to tackle intersecting inequalities a government response should include: macroeconomic policies to create an enabling economic environment for tackling inequalities at sectoral and local levels; broad-based, employment-centred patterns of growth, accompanied by redistributive measures; measures to decentralise and democratise local government accompanied by special measures to increase the political participation of excluded groups; targeting of social services to under-served areas or groups; affirmative action in education, politics and employment; and development programmes to help kick-start a process of change.

sub-standard housing and slum conditions than to be moved away from their social networks and access to income generation (Burns *et al.* 2013; Leather, Ferrari and Cole 2009).

The UK's Housing Market Renewal programme reveals the importance of a collaborative approach between local government and affected communities, working with families to understand their needs. The national evaluation of this programme highlighted: 'a neighbourhood management model to engage with residents and to smooth some of the concerns about demolition and neighbourhood change'; a 'community impact assessment to map those residents who were identified through social services and the county council as vulnerable... [and] to engage closely and in a sensitive manner with these residents' (Leather *et al.* 2009). It further recommended that 'all proposed interventions must include a race equality impact assessment as well as a community engagement checklist'; a mechanism that was used also to hear young people's views about the future of their local area and feed them into the master-planning process through structured sessions delivered by a local education initiative; a sounding panel to allow local people to be more easily consulted; and a community design panel to advise on future proposals (*ibid.*).

The reality in many places, however, is that local authorities – under pressure to manage urban sprawl or to 'tidy up' slum areas – often intervene without consulting the people whose lives they are disrupting. For example, despite India's National Rehabilitation and Resettlement Policy, which has norms and rules to uphold citizens' rights, these were ignored during the slum clearance prior to the Commonwealth Games (Praxis 2013). Other examples include the evictions of the 'numbered streets' residents from Miskolc, Hungary (Rorke and Szendrey 2015). The following example of Cluj in Romania is illustrative of a common response to the complex social problems created by cycles of poverty in Central and Eastern Europe, where local authorities deal with Roma communities through eviction and relocation policies.

4.1 Cluj, Romania

The eviction of one Roma community in Cluj, Romania, from their historical location in Coastei Street, to the insalubrious and stigmatising segregated area of Pata Rât, close to the city dump, apparently happened due to complaints from nearby residents about a few 'anti-social' families. Decision-makers solved the issue by evicting the whole Roma community, leaving them destitute in a new, less advantageous space from where there is no effective public transport. As a result: many children cannot go to school, or parents cannot work if they want to take children to school; people cannot get to work in town on time because of the large numbers of dangerous stray dogs early in the morning; people cannot keep themselves and their children clean because of the lack of amenities; there is a public health risk from living near the dump; the living conditions are incredibly cramped and there is no access to social housing; and residents must endure the stigma of being 'from Pata Rât'.

> *Right when we started to be part of society, children were attending schools, those who were older, they also went back to school so they could have a future. By the time we got integrated, and this was their problem, that we* [Roma] *don't integrate, but this is because they don't allow us. The City Hall, the local authorities, do not help us with anything. They moved us here on the field, they isolated us, they moved us from Cluj, where we had utilities... we had jobs, over 80 per cent of these people were working, every child was going to school, kindergarten.*[4]

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[4] Quote from www.facebook.com/patacluj/?ref=br_rs (minute 9:12)

Well here's another thing: there, on Coastei, we were all stress-free. Honestly. Nobody had to worry about what they were going to eat tomorrow, where to go to work, honestly. We were all happy. In the morning we all sat outside for our coffee, I remember it really well, in the summers we all had coffee together, then everyone went to work, everyone to their place of work. So it was super. It was different, yes. People were not so scared and worried like they are here. Here, look around, you see everyone is cast down, full of worries.

(Interview with Petru Alexandru Fechete (Pepe) in Dohotaru *et al.* (2016: 185))

In this example, people have been marginalised by deliberate local authority policies motivated by powerful economic interests to develop the city as a business and cultural hub. In order to raise the value of the Coastei Street housing stock, they decided to move the Roma – who were easily targeted because of their devalued ethnic identity and low social status. The Roma community's difficulties are compounded by the town's majority population who not only legally dump their refuse in that area, but also illegally dump their own unwanted dogs there. This is echoed by the Roma community's own research in Ny, Hungary, where they showed that one of their biggest problems was illegal fly-tipping from people who did not live locally. They successfully advocated for CCTV cameras to be installed in the Roma segregated area so that fly-tippers could be identified and prosecuted.

Intersectionality plays a role in that it is ethnicity (Roma) and age (children) that intersect with spatial, environmental and economic inequalities, so that Roma children are the most affected by this relocation policy, since they are no longer able to access a number of amenities including education and health care, and are most vulnerable to the worsening situation. Furthermore, by reducing the opportunities for these children to study, the policy creates further knowledge inequality, which is likely to perpetuate Roma exclusion into the next generation. For adults, the resulting intensification of spatial inequality affects their employment, health and education opportunities, and also sends out a message of public endorsement of the stigmatisation of this group.

The story is illustrative of the intersection of inequalities and resulting amplification of exclusion discussed in Section 2: racism compounds with spatial segregation, which compounds with educational segregation. Thus, the state practices and promotes discrimination when its policies segregate rather than integrate, and multiplies the challenges of everyday life for Roma. 'The presence of Roma living on a rubbish dump is a telling metaphor for how Roma are viewed by the state: as detritus, waste, polluting, a stain that needs to be removed' (McGarry 2017: 131). Local government institutions set up a vicious circle of further marginalisation in these cases as the words of this Roma human rights activist from Hungary describe:

There are well-known processes that, when applied to Roma, don't seem to register with sociologists. We know that when someone is unemployed for a lengthy period of time, their mental health starts to suffer. People break down and start operating in strange ways. This happens even after six months. What if this applies to a whole community – not just six months but decades of sustained unemployment that makes it impossible to earn enough money for life with dignity, then all you have left is skewed, forced life trajectories. If I cannot find legal work and a legal income that allow me to have a roof over my head, normal food, medicine when my family falls ill, basic conditions for life, clothing – if I can't find these legally then I will find other ways to get them. Nobody can agree to die or destroy their family or community. So when it comes to survival, people have to find the means to ensure this. So the only ways open remain those that the majority sees as deviant.

Alternatively, local authorities can think ahead and try to set up virtuous circles where they support inclusion and integration rather than division and exclusion. This requires a different approach to the standard short-term thinking, working from a linear theory of change and without information on the realities and hopes of the affected persons. It may be for political gain, or out of ignorance, and it is a demonstration of coercive (visible) power 'over', and relies on the invisible power of discrimination that allows such an action to even be considered as a possibility. So many top-down measures take a linear approach to deal with Roma exclusion, and as a result the Decade of Roma Inclusion in Europe has not had the impact on segregation and discrimination that it set out to achieve (McGarry 2017: 133). What has been learnt about what did not work well, and what evidence is there of alternative approaches to Roma inclusion that might reduce rather than compound and deepen inequalities? Part of the answer is that to deal with a complex social issue requires working *with* the affected groups to identify, with them, appropriate long-term solutions rather than ones which bring short-term wins for local politicians.

5   The challenges for those trying to bring about change

In Section 2 we introduced some ideas about power operating in visible, hidden, and invisible ways. In this section, we relate these dimensions of power to specific barriers that make it difficult for duty-bearers (especially in local government institutions) to promote inclusive policies effectively.

5.1 The visible barriers

Central governments create top-down institutional structures and policies – which are perhaps well-intentioned but in practice often exploitative – that trap or push people into servitude, political disempowerment or segregation. At other times, central governments fail to comply with international legislation that demands an end to inequality. These national policies, arguably themselves developed without reference to intersecting inequalities, frame the space within which local governments must operate, and tend to focus on relocation/housing policies (see above), work/welfare programmes, health and education (with links to housing) or self-government structures for marginalised groups. Below we give a few examples informed by our fieldwork.

5.1.1 Work/welfare programmes

In Hungary, welfare benefits for unemployed people have been replaced by a public works programme or 'workfare'. Claimants are obliged to take on the work that is offered to them or lose their benefits. Work is paid at 70 per cent of the minimum wage. The programme is criticised for violating workers' rights and allowing no escape for people living in poverty, and no chance for them to access the open market because of lack of skills and lack of opportunities. According to the Mayor of Ny: 'Let me be crass here to make a point: people are corralled like cattle into a tight space and then given one chance of escape, one corridor through which they can file and above it, it says 'this is your future'. But they did not choose this, it is something they never wanted for themselves'.

The workfare programme demonstrates how those in power establish the rules and terms on which those in poverty can access resources. It also reveals the invisible power of duty-bearers' assumptions about Roma and/or people living in poverty, that one opportunity will suit everyone, and that they will take it up. In practice, this kind of policy reduces people's agency to improve their own circumstances, and further undermines their sense of rights, dignity and self-worth. When this is happening in combination with spatial inequality and

poor educational opportunities, and compounded by racial discrimination, there is a greater risk of depression, crime and social unrest, as Stewart and Kabeer (ISSC, IDS and UNESCO 2016) warn. There are successful examples of alternatives, such as the employment programme described in Section 6, which considers the needs of individuals and builds their confidence through mentoring.

5.1.2 Segregated education

Often, governments are unwilling or unable to address openly segregatory policies that function to entrench rather than address discrimination. For example, human rights organisations such as the European Roma Rights Centre have long protested state-sponsored educational segregation policies (Amnesty International 2012). Segregated education has severe consequences at the local level:

> *When young people grow up in this system, I see that social problems are reproduced and compounded. This is why I told you at the beginning that this situation with segregated schools breaks my heart because young people should be able to overcome their difficulties in school, not have them entrenched by the system.*
> (Mayor of Ny)

Segregation can be by design or by default. In Hungary, education policy gives special dispensation and additional funding to faith schools (Christian traditional church schools), while funding for state schools is poorly managed by a centralised government body and state schools are increasingly under-resourced. According to the mayor of Ny, the two different educational systems breed segregation, even though there is no active policy to segregate Roma children. 'I could try to address it as the local government, since I could introduce more resources into those schools that are struggling, but my hands are tied [by central government], they have taken education out of our hands'. This means that localities like Ny, where there are only two schools, find themselves with a well-resourced church school that attracts the majority of non-Roma, and a dilapidated state school with more and more Roma children.[5] In Hungary, this 'white flight' cannot be reversed by the local authority since they have no power over local education anymore. This is reflected by the latest Programme for International Student Assessment (PISA) results, which show that:

> Unlike in most OECD countries, Hungarian public education has completely failed to integrate children from disadvantaged backgrounds. Schools with a higher concentration of children from disadvantaged backgrounds fared much worse than schools where students come from more affluent families. The gap between these two is among the largest of OECD countries.
> (Christopher Adam, Hungarian Free Press, 6 December 2016)

Different approaches to funding and managing education can facilitate social inclusion when they also work to build community cohesion and address stigma and discrimination (see the example from Albania in Section 6). However, local policy approaches that overcome the 'macro' barriers need political buy-in at national level, or funding from alternative sources that enables the piloting and demonstration of innovative approaches.

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[5]   In 2015, the Hungarian Supreme Court gave a ruling which went against previous local court rulings (and was subsequently overruled by the European Court for Human Rights). The Supreme Court ruled that schools can legally segregate on religious grounds, i.e. they are not legally obligated to have geographic catchment areas. Following this, the Hungarian central government took away powers from local authorities to set policy and budgets for local schools in their area, and central government now gives disproportionately high amounts of funding to religious schools. Since religious schools can take any children they choose, they have become a proxy for 'white schools' and have contributed to white flight from state schools. Local authorities trying to reduce segregation are powerless because they lack powers to increase budgets and resources to state schools in their territory.

5.1.3 Top-down self-government structures

Community or informal local self-government structures can play an active role in promoting citizen participation in decision-making at the municipal level. They exist all over the Western Balkans, and especially in the countries of the ex-Yugoslav state. The *mesni zajednicas* (MZs) are:

> a traditional form of sub-municipal, community-based self-government that are recognised and regulated by local government laws across most countries in the region, and that are legally recognised as forums where citizens can come together to discuss issues, decide on strategies, and formulate proposals on issues of local significance. *Yet, they are not integrated with one another or within the working of municipalities, and they work essentially outside the local government system* [our emphasis].
> (Mohmand and Mihajlovic 2013: 6)

The lack of regulation of these institutions, their links to formal political institutions, and their access to public funds to engage in service delivery has made them ripe for co-option. In Hungary, there is a system of Roma minority self-government (MSG), which has been applauded for its approach to ensuring the political representation of ethnic minorities. However, it operates in parallel to the formal representative institutions, and has no political clout. Local representatives are treated like lackeys of the majority-led local council; at best, they are used as go-betweens between non-Roma and Roma, or social workers (Schafft and Ferkovits 2017), and at worst (and frequently during elections), as a corrupt body that entrenches non-Roma power by supporting a particular candidate and buying off the Roma votes.

> *The power is never with the Roma. Because all the resources and decision-making powers are in the hands of the non-Roma, so is the power. True, that is the situation, but we cannot agree with it – so these days I am a bit critical towards ourselves. I am annoyed with the degree to which Roma collude with their exclusion. And when we take society as a whole we will see that Hungary doesn't have a tradition of active citizenship; we believe in the king, the barons and the underlings. Which means that the Roma community cannot function any differently even if I personally would love Roma to have their own consciousness.*
> (JS, Roma human rights activist, Hungary)

Because Roma tend to assume that the MSG is the institution that represents them, and do not understand the degree to which it is powerless politically, they often do not seek election in local government structures.

> *There are majority Roma localities where the decision-makers are non-Roma. There are big Roma communities in cities who don't even have one representative on the local council. When you have a 4,000-person strong segregated community it's not enough to say you are excluded when you haven't done anything about it collectively, or even made any attempts to change things. But citizens' passivity and lack of engagement in both Roma and non-Roma circles is such that it's ridiculous.*
> (S, Roma human rights activist, Hungary)

Other countries have other systems, but this is just one extreme example of 'giving people minority rights' that achieves the opposite. These systems do not work because they rely on old paternalistic structures and seek representation through intermediaries, mostly but not exclusively men, who can be manipulated or co-opted, and who act as gatekeepers to block

the participation of less powerful groups within the community, such as young people and women. This is highlighted by J, a Roma academic who talks about the 'Roma coordinator' system in Serbia in which it is left up to the discretion of local authorities to appoint the coordinators. In Hungary, and other societies in which nepotism and clientelism dominate:

> *There are, let's say, people who are like brokers, brokers in the sense that they are* [asked to] *spread the news whom to vote for. And these brokers… even I've seen cases where they are offered business opportunities* [by powerful political leaders]*, but the mayor has a huge project – let's say building a sidewalk. In case you bring me more voters, your company will win the tender and you will receive this project and you can build the sidewalk.*
> (R, Roma academic and activist, Hungary)

Most citizens in Central and Eastern European societies do not have the option to break out of the convoluted and archaic system of paternalistic relationships. But Roma are even more beholden to the system as they are lowest on the social scale, and the inequalities they experience make it even harder to break out of this vicious cycle.

To break out of this cycle, **Roma citizens would need to organise independently and use an understanding of intersectionality and participatory practices to establish such structures that allow them to address and dismantle entrenched discriminatory relationships, rather than hope that the traditional government-established structures will help them**. Roma can gain inspiration from other marginalised people who have equally challenged the old ways of doing things and come up with new forms of organising. We discuss how to do this in Section 7.

5.2 The invisible barriers

As well as specific policies that perpetuate instead of reducing inequalities, **inequalities are maintained through those unacknowledged game-changers, the instances of hidden and invisible power that go unchallenged**. Underlying the policies described in Section 5.1 is the latent *antigypsyism* that keeps unfair and unequitable national policies from being challenged, but also drives negative behaviour towards marginalised groups, even when they are taking steps to address their own exclusion. Take this example of a worker that the mayor of Ny recommended to a local employer:

> *I knew him* [from the public works programme]*, he is hardworking and I was sure he could stand his ground. However, a few days after he arrived a wallet went missing – you can imagine who got blamed immediately. He never went back to that place of work. It didn't matter that after a few more days the wallet turned up; it had been misplaced. By that time it made no difference however, because that* [Roma] *man had been crushed. The people in the team got over it really easily and quickly – 'yes, sorry, we made a mistake, no harm done'. There is so much similar prejudice in so many workplaces – don't bring 'one of them here, we have been doing well so far and we don't want to endanger our work team* [by allowing in a Roma]'.
> (Mayor of Ny, interview)

There is important learning here about how undermining such attitudes are, and how stereotypes and stigma – often unconscious or invisible – are the most powerful of all the processes that underpin social exclusion.

Discrimination is not always visible; indeed, it often works in hidden or invisible ways. For example, setting the date of events too late for minority groups to organise and respond; 'losing' a letter of application (see Box 5.1); allowing sexism to go unchallenged.

Sometimes this may be deliberate, as in the case of the Women's Collective in Ghana, but other times it is an oversight because of a lack of understanding of how marginalised groups function, or a lack of communication channels into these groups.

Box 5.1 Discrimination as hidden power

The Songor Women's Collective in Ghana sent in their application to the local authority to attend the annual cultural festival, but after many weeks without a reply, they found out it had been lost. On reapplication, it 'got lost' again. The women are seen as troublemakers because they are challenging the privatisation of the salt lagoon. They are sidelined by formal institutions and by their traditional (tribal) institutions, which are led by men who feel threatened by the women's group or angry that the women are organising separately. The women have decided to organise and mobilise because their male leaders were not protecting the resource, and some had been co-opted or bought off, while others were illegally harvesting salt through private saltpans.

Discrimination can, of course, be overt, but the consequences endure far beyond the incident, as the following example from R, a Roma academic and human rights activist, demonstrates:

> *R: I was one of the brightest people in the best gymnasium* [high school] *in town, at the time you had to write a test to be accepted and I wrote the second best test of 600 students, yet I was kicked out of the school.*
>
> *Interviewer: What happened?*
>
> *R: Pretty simple, unfortunately out of 600 students I was the only one Roma. There were bigger guys than I am, they were 18, I was 14, I was 50 kg, they were 100 kg, and they provoked me because I was Roma. They were saying that gypsies are not allowed to be here, why you are here. They poured a bottle of water on my head saying that 'Stupid gypsy, you should take a shower', and their behaviour had no consequences, then my behaviour had consequences in the form of being kicked out. Actually I was not exactly kicked out, I was told by the director that in case I do not change my behaviour, I will be kicked out and I said 'you know what? Today I am leaving' and my parents agreed with me that I shouldn't stay there. So I went to the simple secondary school and I finished that... but I am sure if I had gone to a segregated school I would not be here now, I am more than sure.*

In the end, discrimination, whether overt or covert, corrodes the confidence of the affected group, which reduces their capacity to challenge it or take action. The women's activist group of Ny, Hungary, have been organised for some time. But they were not consulted when the date of the consultation meeting on the mayor's new employment programme was set, and their main activist who is experienced in navigating 'non-Roma spaces' was not able to participate. Nobody else from the activist group participated, through lack of confidence: 'It is still really hard for people to appear in places where we are looked down upon [by the majority population]. You heard the mayor speaking about how one incident of antigypsyism can wreck a person' (Zs, Roma activist, Hungary). Systematic discrimination erodes dignity, which is an essential ingredient of social inclusion (World Bank 2013; Burns *et al.* 2013).[6] Activists from stigmatised groups, even when well-organised and having trained for years on this topic, may still decline to participate in public places unless they come as a group, with someone who will shield them from overt discrimination. Part of the issue, of course, is the compounded discrimination that women experience within the Roma community, which undermines their self-confidence as representatives of their community.

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[6] The World Bank defines social inclusion as 'the process of improving the ability, opportunity, and dignity of people, disadvantaged on the basis of their identity, to take part in society' (World Bank 2013: 4).

The mayor of Ny identified this barrier, and observed that: 'the flow of information stops at the limits of the community action group and I don't know how to break that barrier'. He can see the conflict between the clan led by men on the one hand, and the women's group on the other hand – 'they are not willing to work together' – and this frustrates him although he does not go as far as to condemn them but sees this as an internal failing of the Roma community rather than an example of intersectional oppression. But his words suggest an openness to learn about his own blind spots, which bodes well for future conversations between himself and the women's group. Without such 'if' conversations, the mayor will continue to see the problem as pertaining to the Roma, while our analysis shows that this is a more complex issue, involving non-Roma decision-makers, who manipulate these (male) gatekeepers to access the Roma vote at election time.

These examples demonstrate for greater sensitivity about intersectionality. This is a difficult issue for development practitioners to address when seeking to empower stigmatised minority groups, as to directly address discrimination *within* the group can be accused of acculturation by the external actor. However, it cannot be assumed that if the opportunity is there, then a marginalised group will step up. In the case of the women of Ny, the intersection of ethnic and gender discrimination as well as economic and spatial inequality, has had a profound impact on their confidence. Patriarchy is a complex, dynamic and adaptive system in which we are all implicated (Edstrom *et al.* 2016: 59), and which interacts with other forms of discrimination and inequalities to undermine people's sense of their own worth and agency. To counteract this, research suggests that activism is the route through which individuals and collectives can effectively rebuild their confidence and agency.

6   The strategies that can be used to bring about change, taking a power analysis into account

Current research suggests that supporting sustained activism and community mobilisation is an essential component for building accountability between duty-bearers and marginalised people (Howard, Lopez Franco and Wheeler 2017a). This can form the basis and first part of any strategy for social inclusion, along with legislation and effective policies and programmes for inclusion. This is because inequalities are rooted in unjust horizontal and vertical power relations (see Section 2), and transformation of these power relations has to start with the people most affected. The first step is to understand what people experiencing intersecting inequalities are struggling with, in enough detail and with enough accuracy that policies seeking to address their needs are actually fit for purpose. This includes recognising and valuing their own knowledge. The next step is to support them to build individual and collective confidence and capacity. In this way, as Kabeer notes, organisations and local authorities can develop approaches that can help 'challenge the internalization of inferiority, to create a shared understanding of oppression and the solidarity necessary to challenge existing systems of power' (ISSC, IDS and UNESCO 2016: 57). This begins to address the insidious 'taken-for-granted norms and practices that make up the mindset of a society' (*ibid.*) and which devalue some groups of citizens in relation to others.

6.1 Valuing the knowledge of the people who are most affected

People in local authorities and organisations whose job it is to facilitate social inclusion may need to be trained to understand and value the knowledge of the people who experience the issues. The community radio station in Ghana (Radio Ada) has identified, as a priority, working with the 'most affected people' and recognises that they are also the 'well-informed

people' who can provide the best understanding of the problems and co-construct (with accountable and responsive policy-makers) effective and sustainable solutions. But it takes time and effort for those with more power and privilege to recognise the value of the knowledge and capacities of groups which have been historically marginalised – for example, through patriarchy and/or racism. This is echoed by our Roma interviewees, who highlight that policy-makers often have little prior knowledge of the lives of marginalised people, and do not take the time to learn about them or to build relationships in order to have an accurate picture of how marginalisation and exclusion happens, let alone understand the complexities of intersectionality and power. This can often be because the local government system does not require or reward such learning (J, Roma academic, Serbia). The problem is frequently replicated by development workers:

> One of the biggest mistakes is that donors go to non-Roma organisations believing that Roma organisations don't have the capacity to handle the work. They don't actually do the screening of [non-Roma] individuals who work there to find out whether they actually believe in change, they just give the organisation the project to run without making sure that staff who work there believe in Roma inclusion. This is why change does not come. You cannot really see big change in the lives of people because non-Roma don't believe in change, and have discriminatory attitudes against Roma. It happened to me in work with children's education. There is an Albanian I worked with, whose job was to support the children in after-school centres. After a few months, I could not see any result of his work. I went to find out why and the first thing he told me is 'these Roma kids don't want to learn' – it was obvious that he doesn't believe in change, he was not consciously discriminatory but he actually just believed Roma could not make the change. Very often you have these projects run by completely wrong people. You need to screen staff, you need to ask openly when you recruit them – 'what do you think of these [Roma] people?'.
> (I, Romani activist, Kosovo)

There are, in fact, centuries of separation between marginalised people and decision-makers, and this separation may begin to be addressed through training people in policy and programming roles to understand and value the knowledge of marginalised groups, and to learn about intersectionality, before inclusion policies can become effective.

> [If you] go back in history, Roma were never equal members of society, there were times when we were treated better but never equal. We were marginalised in every society... Hungary never treated its minorities well, but in the early twentieth century already Roma were treated collectively as criminals, so in this respect we have a 'tradition' of exclusion, not to speak about the two world wars and the romanticising of Roma. It all has to do with the needs of the majority. For example, the fact that Roma lived by offering services to the majority population and had to move on when the majority customers ran out in one locality, this was seen as proof of our propensity to travel – total rubbish. Even in communism, for which many Roma have a nostalgic hankering, there was segregation and exclusion, but perhaps not so openly or intensively as today. So we never had real equality, ever. Our society is built up with exclusion at its core.
> (SJ, Roma human rights activist, Hungary)

This historical perspective on discrimination resonates with West African analyses of colonialism, which led to traditional authority becoming alienated from the community to which it was accountable, and conspiring with patriarchy to marginalise women from decision-making (Manuh 1994, cited in Quarmyne 2017).

The first step to address this gap between policy-makers and marginalised citizens is to support citizens to become able to communicate their actual situation and their needs to duty-bearers. Otherwise, important knowledge about their reality is lost or distorted to a degree that it ends up working against those who are excluded or ignoring their interests. Different members of a community possess different knowledge, and experience the issues differently. Hence, we need to reflect on the intersection of different forms of inequality, and the power relations that underpin these. If we are attentive to intersectionality, we are not concerned with a generic 'Roma voice' or capacity building: we must think about whose voices are heard, whose voices are marginalised, and how to prepare for fact-finding meetings, as in the example below:

> *It makes sense to include Roma, but just any Roma? No, I don't think so… even these NGOs, they do reach out but there are always those who impose knowledge on them. So it's not always about… there is a lot of racism in the NGO sector, but it's not only about this. So here is maybe where intersectionality comes into the picture because at the local level they also have a lot of prejudices towards poor people, towards young people, they are not perceived as someone who has some accumulated knowledge to share... There was one meeting, more than 10 years ago, and then 'Roma representatives' were invited for the discussion and a person who is involved very much in anti-trafficking policies and practices in Serbia gave some information related to statistics, like the numbers of Roma victims. And these Roma representatives were very angry, saying that 'why you are saying this, it's not OK', they told this person that he is discriminating against Roma while he is actually, he was actually honestly trying to raise the question, you know. And that is where the collection of disaggregated data on Roma trafficking stopped.*
> (J, Roma academic, Serbia)

Participatory action research processes can be a means of surfacing and working with this knowledge (Howard *et al.* 2017a). In the case highlighted above, an effective first step could have been to support groups of young female Roma who have experienced the situation in question (trafficking) to come together and produce their own knowledge about the subject and lead the discussions. Research by and with the 'most affected people' will produce valuable knowledge about the issue, without which enduring solutions cannot be found:

> Knowledge from the margins not only pinpoints and describes problems, it can also be used by policymakers to open up and build dialogue about possible solutions… [which] has the power to break discriminatory norms and silences around injustices. This process can be the basis for mobilisation at multiple levels, in order to contribute to accountability and build a basis for sustainable development.
> (*ibid.*)

6.2 Ways of building individual and collective citizen agency and capacity

As mentioned in Section 6.1, participatory action research can play a key role in surfacing and validating the knowledge of discriminated groups, whose voices have been historically and systematically marginalised. In the case of the women salt-winners' collective in Ghana (see Box 6.1), the local community radio station has facilitated this process and accompanied the women in their journey as they have gained confidence, individually and as a group, to challenge cultural and social norms and demand to be heard.

Box 6.1 Shifting power relations to address women's marginalisation in Ghana

Women who live in the communities bordering the Songor lagoon in Ghana experience multiple forms of marginalisation. Where they live is spatially marginalised: the nearest health centres, schools and markets are more than walking distance; they eke out a living from 'winning' salt from the lagoon, following traditional practices which are artisan and sustainable; they are marginalised from decision-making in traditional power structures because of their gender; the majority are non-literate in terms of 'book-long' learning.

They have organised, with the support of local community radio station Radio Ada, to challenge the lack of initiative among their traditional tribal leaders (men) and also within formal local government to protect the Songor lagoon from illegal exploitation practices, which are damaging the resource. To do this, they have had to challenge the gendered tribal hierarchy in the traditional power structure. Their cause sparked interest among the 'Queen Mothers' – women who have more status and economic power within their community, but also experience gender discrimination and do not have significant decision-making power. However, they are using their status and visibility as 'Queen Mothers' to support the cause of the Songor Women's Collective. The women are now listened to by traditional and formal local and national leaders.

This example reveals that building the individual and collective capacity of *people experiencing intersecting inequalities* can require navigating their relationships with more powerful members of their (e.g. ethnic) group, who may act as gatekeepers and claim to speak for them. It will also require, as Kabeer notes, transforming the relationships between these groups and other groups of citizens in the locality: 'transforming horizontal power relations requires a transformation of relations between citizens themselves' (ISSC, IDS and UNESCO 2016). Progress in transforming relations between more and less privileged groups – in this instance between Roma workers and non-Roma employers – can be facilitated by the commitment and actions of key allies in the public sector:

> *In our town, the mayor paid particular attention to mentoring programmes for individuals from marginalised communities, making sure that they don't get stuck in public works programmes. In fact, he is determined to do away with the exploitative public works systems in our town, since there are so many investors and he knows that everyone who is capable of it can get a job locally. He is a real champion for local people, he knows them personally from having worked with them for years* [as a supervisor in the public works programme]*.*
> (Zs, Roma activist, Hungary)

In the Ghana example, a community-based CSO has supported the women in the process of building individual and collective citizen agency. This can be a transition role, until the activist group has the capacity to work directly with local government; and/or until local government has gained the knowledge and skills to listen to and work with the activists. However, from our experience, CSOs and citizens' groups are justifiably cautious of engaging directly with government, simply because the level of unacknowledged discrimination they experience from duty-bearers is too high. When local government does begin to work with activist groups in a way that sees activists as equal partners and values their contribution in improving policy – listening and acting on what they say – this builds the capacity of the groups and fosters trust and two-way accountability – the third dimension needed for reducing inequalities:

> *I: Has the local government helped your activist group to develop?*

> *Z: Of course they have, there are so many examples. Whenever we need meeting space, we can meet at the local culture house for free... And then **they used our ideas to develop this new employment programme** [our emphasis]**,** and made sure that mentoring is part of it, and that when employers*

hire they don't only hire people with high qualifications, but also manual workers. [Together with the local government]*, we have helped Roma to understand that they can get work locally.*

(Zs, Roma activist, Hungary)

6.3 Accountable and responsive government

As Kabeer notes, building 'inclusive forms of citizenship requires the transformation of the relationship between state and citizens' (ISSC, IDS and UNESCO 2016: 56). This may mean making visible unprofessional and dehumanising ways of behaving towards stigmatised groups, or publicising instances of discrimination, 'for example, when Roma are treated worse or even inhumanly by LG [local government] employees or police, when you're not allowed to enter public spaces such as restaurants or local authority offices; or when only Roma are followed around by security staff in shops; or employment opportunities magically disappear when a Roma applies' (SJ, Roma activist, Hungary). Transforming the power relationship between the state and marginalised citizens is difficult, from both sides, and requires building accountability through processes that involve the marginalised groups themselves and build their capacities. Elsewhere, we have called this 'participatory accountability', and describe it as 'a process through which the knowledge that the marginalised hold, is engaged with and integrated into planning and monitoring' (Howard *et al.* 2017b: 14). There are examples of individuals, organisations, mechanisms and policies that facilitate the voice and influence of marginalised groups on the one hand, and local government capacity and political will to be responsive and accountable, on the other. The challenge is to bring these together in sustained processes.

One example that has shown potential in some contexts to directly and practically affect the lives of those marginalised is participatory budgeting, 'a democratic process in which community members directly decide how to spend part of a public budget' (see www.participatorybudgeting.org). Another such mechanism is that of self-government structures. These have much potential but, as we have shown earlier, need to be grassroots-led and supported both by citizens and the state to be more effective mechanisms for voice. Where these do not exist, or have been co-opted, then activist groups must form their own relationship with local government. When activist efforts to engage the state are met by responsiveness from policy-makers, trust begins to be built, and a sense of accountability, where there has previously been none. When politicians take the time to visit a marginalised community and listen to people's concerns, and when a marginalised group is invited to take part in a genuine (as opposed to tokenistic) policy consultation process, the first steps towards accountability are taken:

Remember when they [LG] *came to the public forum that we organised to discuss the refuse collection, the mayor showed up and a few councillors too. That was very important for local people, to see the local government representatives in our segregate. And then they invited our activist group specifically to consultations about the new integrated community programmes, so that we are now informed and can have an idea about how they do fundraising on our behalf.*
(Zs, Roma activist, Hungary)

Another approach is for NGOs to pilot approaches to building social inclusion and carry the risk (of failure) so that local government is able to take up an approach that has been demonstrated to work. This was the case in Tirana, where a local NGO developed a programme to reduce educational segregation through collaborative working between the NGO, school staff, local government, and Roma community leaders (see Box 6.2).

Box 6.2 Desegregating education through a holistic approach

The Alternated Education and Vocational Training Project (CEFA) in Albania is implemented by local organisation NPF (Ndihme per Femijet). It is one of the very first initiatives in Albania to support Roma inclusion through education and family/community development. It initially focused (1998) on Roma children's education through catch-up classes, exclusively created for mainly street Roma and Egyptian children and trafficked and/or exploited children, and was backed by a strong humanitarian approach on food provision in exchange for children and families' participation in the programme. Over time, the approach evolved with the communities it served, and to address issues of sustainability/institutionalisation (e.g. catch-up classes created only with Roma students might lead to segregation).

In 2009, the Ministry of Education took over the salaries for eight teachers working with catch-up classes and in 2013 all children were part of mainstream classes. The food basket was reduced and replaced with an approach aimed at empowering families through income-generation activities and vocational training for (self) employment. By 2012, the food basket was dropped and the new approach was fully functional. With the support of SDC, the process has also worked on the development of social services and since 2013 the knowledge, practices and know-how are being shared with the local social services and school staff in four cities.

Some of the positive effects of this model at the system level have been to put education of Roma/Egyptian children high on the agenda of the Ministry of Education, which had to create legal dispositions and avenues to accept Roma children more easily into the public system – i.e. the order that every child should be in school with or without a birth certificate, a zero dropout strategy, collection and analysis of school statistics disaggregated by ethnicity (which served to provide new instructions and orders of the regional education directorates to the schools on the issue of hidden dropouts), and creation of a school-friendly environment for Roma and Egyptian children.

The programme adapted to deal with the challenge that although the model was institutionalised, in that CEFA classes became part of the education system, Roma children were not accepted easily into the school. The programme used training of teachers and the constant work of social workers to build bridges between CEFA and other mainstream classes, which finally overcame the barriers of communication and integration in schools.

The local authority played an important part in preventing non-Roma parents from registering their children in a different school. A second mainstream pre-school class was opened in the project school in Tirana, which helped to increase the number of Roma children going into pre-school education, as well underlined the importance of the application of the early child development principles.

Source: SDC Albania

The Participate research identified that:

> Perhaps the most important route for tackling discriminatory social norms is **education** [our emphasis] – both formal and informal. Education providers can communicate powerful messages about how poor and marginalised people are perceived by the state. Training officials in the values of service to the whole community and recruiting more people from marginalised groups are ways that a sense of citizenship can be strengthened.
> (Burns *et al.* 2013: 46–7)

In the Tirana example, the multi-stranded approach is helping to address spatial inequality/exclusion as well as education because it **actively addresses discrimination**, by building the capacity of non-Roma staff, training and integrating Roma teachers, retaining non-Roma families in the school and neighbourhood, and promoting integration.

6.4 Effective approaches that CSOs and activists can adopt

6.4.1 Transforming horizontal power relations

As discussed earlier, local government is often caught between national politics and local social pressures, including social norms which can make it difficult for politicians who are 'pro' stigmatised minorities to get re-elected. Addressing intersecting inequalities therefore requires a joint effort between local authorities and CSOs to support the organising and mobilising of activist groups to raise the voice and influence of marginalised groups. The focus here is on t**ransforming horizontal power relations –** a transformation of relations between citizens themselves. This process can be accompanied and supported by legislation and policies to promote the rights of marginalised groups. A first step can be to make visible the exclusion, social norms (often invisible) and spatially excluded and hidden realities (Howard and Vajda 2016). 'Civil society organisations can play an important role in addressing stigma and discrimination... in partnership with those experiencing it daily' (ATD Fourth World 2013: 20). CSOs are often well placed to build long-term relationships with marginalised groups themselves, to listen to and support them to build their voice in order to challenge the status quo and to support their demand for inclusion on their terms. This is likely to involve supporting marginalised groups to organise and engage with policy-makers and gain political representation. These processes must underpin and accompany or precede statutory social inclusion interventions**.**

> *But what was important was that throughout we were mentored by the same* [NGO] *people, who know our group and know what the next step needs to be in our development, who don't start from zero every time but allow us to learn the right skills at the right time.*
> (Zs, Roma activist, Hungary)

6.4.2 Building personal relationships and solidarity

Efforts to build individual and collective confidence and capacity are closely linked and, indeed, feed into each other. We can see from both the examples in Ny (Hungary), and from the literature about Pata Rât (Romania), that activism has been a key enabling factor, especially the relationships formed by people in the course of activism. Activism builds personal relationships which bring respect and dignity to people struggling with stigmatisation.

> *L: I became an activist because I wanted to. I wanted to get justice... Inside of me I have these dreams, these thoughts, these goals I want to reach. Together with my friends, with my colleagues, we want to change something. It's the wish to make things go better: that's what pushed me to become an activist... I have many memorable moments* [from my life as an activist] *moments that I lived with my whole being. One is when we went to the European Parliament with Amnesty International and gave a speech of about 20 minutes. This gave me enough time to talk about all the troubles we have in Pata Rât and then I saw some people who were alongside us. At the end of my speech, they all stood up. I started to cry and by the end everyone was crying. And I saw that people were with me, I felt their solidarity. Even if that was just a feeling, even if right then they could not do anything specific for me. But I know that the local authority in Cluj was put under pressure after that event.*
>
> *I also have other memories from what we achieved in Cluj. Like when we protested in front of the House of Culture at our first ever event and you* [the interviewers] *came with me. I felt your solidarity and friendship. I felt your caring, it was like a gentle touch. I cannot express it in words.*
>
> (Interview with L, Roma activist, in Pata)

Relationships are highlighted by all the people we interviewed in this research, including the non-Roma mayor, as the key to enabling Roma to overcome both antigypsyism and sexism. CSOs can also play a crucial role as bridge or intermediary, making links, convening meetings, and providing venues, access to training and so on.

> *I was always an activist... but what made me really embrace it was that I saw duty-bearers not really doing their jobs. Still at that stage, a few years ago, I was still an individual looking for my place* [in the world of activism]. *I didn't find that place until I joined the ROMED* [European Training Programme on Intercultural Mediation for Roma Communities] *programme, which taught me about mediation, but I still knew I needed to join an activist group.* [NGO] *helped me to do this through relationships – not the training first and foremost because I already knew a lot, but by making it possible for me to get close to people whom I knew about (like SJ), but getting to have a personal relationship with them was key… The relationship capital.*
> (Zs, Roma activist, Hungary)

6.4.3 Support for training, building organising skills

Sometimes activism in itself is valued far above any of the other issues deemed as important by Roma in segregated communities. The aspect of mutual support is as important as the results of the activism. 'This little group here, it gives a great plus to my life. We are women we can talk here about our lives. I almost don't see it as a group, but really as my family.' She continues: 'The skills we learn [as community organisers] are very important, we feel that we know how to represent our interest. I never knew I was going to learn so much at 53 years of age. I know I am capable of much and I will be capable of more, but for that I need this group here.' This is also reflected in the comments of the women who have formed the Women's Collective to protect the local natural resource in Songor (Ghana): 'I was a dove and now a lioness. First, I was calm, I didn't care about the Songor lagoon but this year I've realised that we need to fight for it. So now I'm brave and fierce, ready to fight for our resource.' 'I was like a hen because I didn't care about salt-winning, as long as I won my money. But now that I've been educated and understand I decided to be a dog, because I'll bark and defend the Songor lagoon if someone is to destroy it.' The women's confidence has grown as they have met together and built their organisation, and with the support of the local community radio station (see below), they have accessed knowledge about the laws protecting the lagoon, which are being violated.

6.4.4 Intermediary organisations committed to the process

Often, for an activist group to grow and begin to have voice, the accompaniment of an intermediary organisation that is locally embedded and committed to the process can make a huge difference. This has been the case for the Songor Women's Collective in Ghana, which has been supported throughout their earliest days of organising and in their first steps of mobilisation by Radio Ada. This local community radio station uses a community development approach and participatory methods to work with the group as they build their capacity. The radio station has facilitated the women's access to training in community organising and information on relevant laws. Similarly, in Hungary, the Roma women's activist group in Ny has been supported through the long-term commitment of a group of NGOs working together in the same locality, which the women have begun to trust as genuine partners:

> *For our group to grow, what was important was not just to learn disparate skills, but* [through a series of NGO projects]*, to build a strategy of how to take our ideas forward. We saw that we could make a practical difference together, and additional programmes added to these skills.*
> (Zs, Roma activist, Hungary)

6.4.5 Simply allowing marginalised people to get on with organising, and honouring the process

It is important sometimes for politicians to simply trust and honour the organising efforts of marginalised groups and take note of the positive strength of those communities when it shows itself. For non-Roma decision-makers, this means, among other things, stepping back and not getting frightened by citizens' initiatives even when these are not formalised or controlled (such as civil disobedience), and gaining an understanding of the positive effect of unruly politics (McCluskey 2016).

> *This is a very simple recipe, one that I need to keep spelling out. I have noticed in communities that changes happened where Roma have noticed their main strength, which is in their numbers... I know of a locality where Roma have started to cooperate. Before this, they had no influence on anything. As soon as Roma started to cooperate, in spite of their internal differences and tensions, they started to have a decisive influence on all those issues that affect their lives. From that moment, they were no longer excluded from decisions of the local council... As soon as politicians saw the united front, they realised that Roma votes would win the day at the next local elections... In another locality, Roma decided to very visibly start turning up at the council meetings – something that had not happened for decades. Non-Roma, of course, were also not in a habit of doing so. So Roma started turning up at the council meetings, 30–40 or even 100 of them, in a small village. So suddenly the council saw that a body of citizens were interested in a particular issue* [under discussion in the council] *and this made a difference. I don't know of any other method – it's useless to wait for the non-Roma majority to wake up thinking 'from now on we will no longer be exploitative and excluding', this will not happen. Roma need to wake up to the fact that the power is in their numbers, in their cooperation.*
> (S, Roma human rights activist, Hungary)

6.4.6 Contributing to building accountable and responsive government

There are numerous ways in which CSOs can work with marginalised groups to help build accountable and responsive local government institutions. One way is to identify and work with allies within government. In Ny (Hungary), the current mayor is seen as a long-term ally who has supported and worked with the Roma women activists' group for many years, from before he was elected. The knowledge that some of the ideas that he incorporated in his new 'opportunity for the future' employment programme came from their group is empowering and truly transforms the relationship between the state and these citizens: 'We have lobbied him for months about the importance of mentoring people who are new to the world of employment. I'm glad he's taken it on board. I don't mind that he used our ideas' (Zs, Roma activist, Hungary). But from the mayor's perspective, it was not easy to take up the women's suggestions, even when he knew they made sense: 'I often have to fight my own staff on this. I come up with an idea for a policy that I know could work, and they tell me that it cannot be done for this or that legal reason. I tell them to find a solution and make it happen… there is always a solution if you want to find it' (Mayor of Ny).

> *I: I know your mayor won his election by 250 votes only: how many of these do you think are Roma votes from people who trusted him?*
>
> *Z:* [laughs] *I should think all of them, you should know that in the Roma community he carried about 70 per cent of the vote. The thing is, we all knew him for years and he has this talent to connect with people, not just the community but also business leaders* [who can bring investment to the city]. *The last mayor was OK, but not nearly as good at this.*
>
> (Zs, Roma activist, Hungary)

Our example of Ny shows that even when working with opposition parties who are not automatically part of the national power structure, or perhaps even more in this case, 'our mayor doesn't rely on hand-outs from national government, he knows he must make his own way' (Zs, Roma activist, Hungary), local government leaders can be a hugely positive influence, and have power to bring communities together and effect real changes in the lives of marginalised people. In the best scenario, they bring to the table a deep understanding of the marginalised community and its issues, good interpersonal skills (which they use with all their constituents), a commitment to addressing inequality, and the drive to find new solutions to practical problems that benefit the whole of their constituency rather than a select few.

7 Conclusions and recommendations

Many of the examples of intersecting inequalities in this paper are drawn from the experiences of Roma living in Hungary and Romania, and women living in rural Ghana. We believe that their experiences and perspectives on what makes for effective policy-making to address inequality and exclusion resonate more widely. This wider learning suggests the need for approaches which recognise that multiple forms of inequality are intersecting, rather than additive, where, as Kabeer notes, 'each fuses with, and exacerbates, the effects of the other' (ISSC, IDS and UNESCO 2016: 58).

Paraphrasing an observation from Rowlands (2016: 129), in Romani inclusion work as elsewhere, 'there is significant potential to support a new generation of locally appropriate development work, that makes the most of potential synergies between actors, that transforms power relations in favour of those who currently get a poor deal'; however, as yet, this potential is not realised. **Such an engagement with power requires seeing, challenging and overcoming social norms that allow majority citizens and duty-bearers to mistakenly blame the marginalised group for current difficulties, rather than historically created and perpetuated structural inequalities**. As a Roma activist observed:

> *When you close people into a ghetto, that creates its own ghetto subculture. So what you may view from the outside as a Roma cultural characteristic, from the inside it looks like part of the ghetto culture, which means that anywhere in the world, if you segregate a group of people spatially and you treat them negatively all the time, then this creates its own set of rules that deviate from the rules of the majority – but this is not ethnic culture, because this mechanism works the same the world over… South Africa, US – same elements, low education, deep poverty, early marriages, early deaths, higher criminality – any ghetto will produce these.*
> (SJ, Roma activist, Hungary)

Just as experiences resonate across different settings, so we conjecture that the solutions are also to some extent universal, and that lessons learned from the successes of one marginalised community can be applied to another with good effect.

There are two key strands we are proposing for addressing intersectionality:

1. To build the internal personal confidence and capacities of marginalised people and support them to come together to develop a collective sense of their own value and rights.
2. To work with the powerful to reflect on their own role and positionality in systems that create or perpetuate these inequalities.

It is essential that this work is based on the theoretical understanding that the multiple forms of exclusion which marginalised people experience are not caused by their social or cultural identities in themselves, but by historical and normalised processes of cultural and social discrimination, which in turn shape decisions about access to spatial, economic and environmental goods.

We have argued that both direct and indirect policies will be limited unless they also address the underlying inequalities of power and voice, and we have emphasised how discrimination drives these inequalities, often in invisible ways. We have proposed that to overcome the widespread and insidious hidden and invisible power of discrimination requires local government and other development professionals to support processes through which marginalised people can develop their 'power within', 'power with' and 'power to' – for example, through supporting activism, and individual and collective reflection-action (Rowlands 1995). When groups experience multiple forms of discrimination – as we have discussed here in the case of Roma and for rural women in Ghana – it is important for the groups themselves to gain a strong voice in order to challenge the status quo, hence the critical importance of building confidence and capacity in these groups, and supporting them to organise and engage with policy-makers and gain political representation.

Moreover, these processes must underpin and should precede social inclusion interventions if they are to truly transform inequalities. Effective policies are underpinned by appropriate theories of change. These theories of change are likely to be multi-stranded, working simultaneously on vertical and horizontal inequalities in partnership with activist groups, NGOs and local government institutions. These theories of change will also embed policies in a longer and deeper process of transformative social change.

Processes will also need to engage with privilege, where development practitioners and duty-bearers apply a power lens to their own activities in ways that leading development organisations have embraced but still struggle with:

> It is still a challenge to ensure that Oxfam's own power is factored into the thinking, both constructively, such as using its convening power to bring people together who otherwise might not collaborate, or in mitigating potentially negative effects such as imposing bureaucratic requirements on partners that make it hard for them to stay focused on their own goals.
> (Rowlands 2016: 124)

Finally, **valuing the knowledge of marginalised groups is a critical entry point to addressing intersecting inequalities, but requires practitioners and policy-makers to 'base their practice in values and an understanding of their own role in the system of discrimination'** (J, Roma academic, Serbia). To do so is to recognise that they hold their own power by virtue of their privileged positions, and to recognise that they are often operating in an echo chamber when they talk only with political representatives of the marginalised group who are themselves not in touch with local knowledge, and that intersectional discrimination silences the views of those most oppressed (as is often the case for women, see Box 6.1). Those who enjoy privilege through belonging to socially privileged groups can easily feel threatened in that position when socially stigmatised groups fight for their emancipation, and even more so when those who are less powerful gain some of that power. In some cases, this leads to a backlash at the very moment when disadvantaged groups achieve a modicum of power. For this reason, it is important to pay attention to how activists, practitioners and policy-makers born to privilege can process their positionality in advance, so that they are prepared to work with the disadvantaged in negotiating and even sharing positions of power (Land 2015; Chambers 1995). This will include reflecting on how stigmatised groups are viewed by mainstream society and in policies, and how their problems are constructed in policy-making. A power analysis is a good place to start.

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