9 Poverty and the Roma as a lasting entanglement in Central and Eastern Europe

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Introduction

This chapter critically examines the conceptualizations of Roma-related poverty research, their accompanying methodological parameters, and the empirical findings obtained in Central and Eastern Europe in academia or civil society. Parallel to these scientific inquiries, Roma poverty has been conceptualized, diagnosed, and measured by several international organizations (IOs), including the World Bank (WB), the United Nations Developmental Programme (UNDP), the European Commission, the Council of Europe (CoE), the Organization for Security and Cooperation in Europe (OSCE), and the Open Society Institutions (OSI, which later became Open Society Foundations, OSF). My paper aims to cross-read and re-examine these studies through their epistemological and methodological threads, which have suggested policy interventions informed by particular understandings of the causes of poverty among the Roma across Central and Eastern European countries. This chapter demonstrates that the issue of poverty in Romania needs to be linked with the wider political economies of Roma in Central and Eastern Europe.

I argue that scholars such as Nancy Fraser have advanced our understanding of the ways in which neoliberal racial capitalism generates and reproduces inequalities, marginalization, and exclusion, thereby perpetually fostering and consolidating racialization (Fraser, 2016). She proposes an understanding that differs from the exploitation-centered conceptions of capitalism, which, according to her, cannot explain its persistent entanglement with racial oppression. This nuanced approach helps us decipher the reproduction of extreme poverty in the era of neoliberal capitalism when "Roma inclusion" was high on the developmental agenda. In addition, this approach enables us to reveal that the dominant explanations for why most Roma people are poor and have been trapped in poverty for many generations reflect the broader political-economic dynamics, relations, and ideologies that prevail at a particular historical juncture.

For more than three decades in Central and Eastern Europe, various research tracks have problematized and framed Roma poverty through the lens of culturalist, functionalist, and structuralist theories. This chapter reviews the most significant studies and approaches that have been developed regarding the poverty of the Roma in the region. At the same time, after 1989, in Central and Eastern European countries, alleviating poverty was placed on the national and transnational political

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agenda as a developmental issue. This was manifested in the launching of the Decade of Roma Inclusion (2005–2015) by the World Bank and Open Society Institute, which explicitly aimed to reduce the socio-economic gap between the Roma and non-Roma. Later, this effort was reinforced by the growing political concerns of the European Commission and, in 2011, resulted in the adoption of several documents, including the EU Framework for National Roma Integration Strategies up to 2020, followed by the new Strategic Framework for Roma Equality, Inclusion and Participation for 2020–2030. I review studies and documents on Roma poverty while cross-examining them with the broader political economy and its policy implications.

My argument is built upon critical scholarships that explain why the racialized structural poverty of the Roma that accumulated over several decades has hardly ever been mitigated by any developmental initiatives. The major developmental research and policy approaches in the region have centered on economic growth as the primary tool for improving progress and simultaneously reducing poverty. However, three decades of research and policy implementation have shown that although economic growth has been achieved at the national and regional levels, it has not had a sizeable impact on reducing the percentage of people living in entrenched, extreme poverty.

This paper is divided into three interrelated parts. The first section provides an overview of the theoretical conceptualizations of poverty and their impact on Roma-related research in Central and Eastern Europe. The second part reveals the interrelation between poverty studies and the anti-poverty policies suggested by international organizations in the context of neoliberal capitalism. The third section elucidates how one may understand the reproduction and entrenchment of Roma poverty through the lens of racial capitalism.

Theoretical conceptualization of poverty in Central and Eastern Europe

The first part of my chapter provides an overview of theoretical conceptualizations of poverty and the ways in which they connect to understanding "Roma poverty". Categorizing the dominant approaches and their intersectional dynamics, such as *culturalist*, *functionalist*, *and structuralist*, I relate them to sociological and anthropological schools focusing on ideas, patterns, and explanatory frameworks that have explained the perennial and entrenched poverty of the Roma in Central and Eastern Europe. General poverty research differentiates between subjective and objective poverty based on the definition of poverty thresholds. It distinguishes among relative, absolute, and ultra-poverty and reveals the difference between unidimensional and multidimensional poverty. Such scholarly approaches explain the cause of this phenomenon in various ways and consequently influence the perceptions of the experts who design various anti-poverty policies. Matache and Barbu (2021) provide the most extensive discussion on the theorization of Roma poverty through the lens of human rights, structural injustice and racism, the wealth gap, and poor neighborhoods, which constitute racialized poverty.

I attempt to combine the various categorizations of poverty theories that impact "Roma poverty" studies. These can be categorized into three prominent theoretical families: 1) cultural-behavioral, 2) functionalist, and 3) structural. According to David Brady, theory as a conceptual framework should provide some guiding principles that (a) "enable predictions and specific testable implications across a range of settings and/or (b) explanation of specific cases" (Brady, 2019, p. 157). In most cases, social scientists start by identifying a social problem, such as poverty, and then conduct research to measure and explain it accordingly. However, the operation of value assumptions is still overlooked and unproblematized (Townsend, 1979). Townsend indicates that policy prescriptions are imbued with theoretical conceptualization, and specific measurements imply a theory (explanatory frame) based on values. Consequently, no value-free anti-poverty policy exists since theory is embedded in the conceptualization, measurement, and formulation/implementation of policy. Advancing David Brady's (2019) classification of theories of poverty, I added two crucial categories, cultural and functional, which intersect with his categories of behavioral and political. Given the overlapping spectra of these categories, I merged them accordingly as *Cultural-Behavioral* and *Functionalist.* The third category, *Structural*, remained a common type. Most of the poverty research agenda has centered around these categories, which have also resonated with poverty-centered Roma-related studies.

Cultural-behavioral theories

Cultural-behavioral theories explain the cause of poverty as cultural and behavioral, the latter of which is more scientifically acceptable (for instance AEI-Brookings, 2015; Sawhill, 2003 cited in Brady, 2019, p. 158; Lewis, 1959; 1966; 1968). According to behavioral theories, poor people are trapped in poverty because they engage in counterproductive behavior or risk, such as single motherhood, unemployment, or any other "social deviancy", which significantly increases the likelihood of poverty (Bertrand et al., 2004; Durlauf, 2011 cited in Brady, 2019, p. 158). According to this literature trope, poverty is high and dense in a context where people are engaged in problematic behavior. Furthermore, this approach implies that poverty is reproduced by the mechanism of risky and deviant behaviors that are disproportionally prevalent among racialized minorities. In addition, this type of study suggests that we need to change these people, reducing their risky and deviant behaviors and activities to reduce poverty (for example, AEI-Brookings, 2015; McLanahan, 2009). As McLanahan (2009) argues,

> "to break the intergenerational cycle of poverty, we will need to find a way to persuade young women from disadvantaged backgrounds that delaying fertility while they search for a suitable partner will have a payoff that is large enough to offset the loss of time spent as a mother or the possibility of forgoing motherhood entirely".
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> (McLanahan, 2009, p. 128)

This implies that changing young, disadvantaged women's behavior and cultural values will improve their social and economic status.

The cultural-behavioral approach also focuses on the "incentive" that influences poor people's behavior. Typically, this incentive could be a generous social benefit, particularly with the presumption that it might encourage "moral hazards and welfare dependency and disincentivize against poverty-reduction behaviors like work and marriage" (Brady, 2019, p. 158). Banerjee and Duflo changed this perspective and argued that a dysfunctional market and problematic policies discourage poor people from investing in productive activities that would give them a better economic perspective (Banerjee and Duflo, 2011).

While a range of new literature on the culture of poverty (Lamont and Small, 2008; Harding, 2010; Small, Harding and Lamont, 2010) offers more sophisticated knowledge, Roma-related poverty studies are more entrenched in the outdated model of "culture of poverty" coined by Oscar Lewis (1959, 1966, 1968). Essentially, Lewis argues that people who have been poor for generations constitute a separate culture that perpetuates itself over time despite structural changes. Although several scholars, including Valentine (1968) and Gans (1995), have critiqued "the culture of poverty" for "blaming the victims", this knowledge is widespread. It has also influenced contemporary neoliberal discourse, reinforcing the practice of "blaming the victim" against people in poverty. Contrary to the "culture of poverty", which emphasizes the essentialized cultural values of poor people, there is an essential development among behavioral scholars exploring how poverty shapes behavior to reproduce intra- and intergenerational poverty. According to this emerging scholarship, poverty imposes enormous cognitive and emotional burdens, stress, and trauma, which contribute to behaviors that reinforce poverty (for example, McEwen and McEwen, 2017; McLoyd et al., 2016). Consequently, the pervasive structure of poverty damages children's cognitive development and learning skills, which leads to low educational attainment (Guo and Harris, 2000; Sharkey, 2013).

The concept of a "culture of poverty" was also solidified in Central and Eastern European social science research practice. In Romania after 1989, similar to the Hungarian social science research trajectory (Ladányi and Szelényi, 2001b), scholars have argued (Péter, 2003; Pásztor, 2003; Stănculescu, 2004 cited in Horváth, 2013) that the political transition from state socialism to liberal democracy led to a new type of poverty in which ethnicity and gender play a more restructuring role than they did during communism (Horváth, 2013, p. 20). As noted by Anikó Horváth (2013, p.21), "Stănculescu identifies four types of poverty in Romania and states that cultural characteristics of those living in extreme poverty hinder families from improving their social status" (Stănculescu, 2004, p. 43 cited in Horváth, 2013, p.21). Horváth provides another example to explicate the culturalist approach in Romania in the research of László Péter (2003), in which he discusses the survival strategies of the "new poor". He distinguishes between "passive" and "active" coping strategies and deploys them in the following way: Those opting for "passive" strategies try to reduce their consumption, while those employing "active" coping try to increase their income (2003, p. 26). He concludes that the

Roma still used their mental scheme that was developed in the former regime and were inclined to opt for "passive" strategies based on the degree of their poverty. Those who are deeply entrenched in poverty are more likely to stay "passive" than those who are less trapped in poverty (Péter, 2003, p. 31). Horváth notes that both Stănculescu and Péter base their arguments on detailed quantitative and qualitative methods without understanding the complexities of the situation or the historical and longitudinal aspects of poverty (Horváth, 2013, p. 21). Furthermore, "Stănculescu's and Péter's analysis produces shortcomings that are similar to those found in Oscar Lewis' 'culture of poverty' theory" (Horváth, 2013, p. 22).

Functionalist theories

Several studies that focus on Roma poverty echo some functionalist assumptions that society's structures and processes exist because they serve important functions for society's stability and continuity. In line with this view, functionalism assumes that social stratification exists because it plays essential roles in the system. This early explanation was developed by Kingsley Davis and Wilbert Moore (Davis and Moore, 1945) and later by other sociologists in the form of logical assumptions implying that stratification is both necessary and inevitable. A strong internalized assumption regarding inequality is deeply attributed to individual ability. The functionalist approach assumes that people move up the economic ladder and are highly paid based on their abilities, skills, knowledge, and, more generally, their merit. This implies that if people do not move up the ladder, they lack the necessary merit, but this lacks any consideration of the multidimensional approach to stratification and other structural obstacles that inhibit social mobility.

Peter Townsend (1979) notes that in all societies, different social positions with various pleasantness and difficulties exist. To ensure that all the positions are filled, certain rewards must be associated with them in which motivation has an important role. However, as Wesolowski (1962) and others have explained, the centrality of motivation depends on other contextual issues, which makes it difficult to test functional theory. The functionalist approach, which has dominated the sociological imagination and played an important role in establishing social stratification based on inequalities of status, as Townsend (1979) articulated, has partly provided a sociological and political convenience that has been closely paired with the ideology of "meritocratic equality of opportunity" (Townsend, 1979, p. 84). As he further explains, "sociological studies tend to be preoccupied with occupational ranking and movement between ranks instead of the actual distribution and accumulation of resources and, indeed, the connections between the two" (Townsend, 1979, p. 85). Mark Abrahamson harshly criticized the functionalist approaches for "an undue predisposition to assume consensus" and "an implicit ideological conservatism which supports the status quo" and identified this approach as linked to "establishment sociology" (Abrahamson, 1973, p. 1236).

Another line of functionalist thinking focuses more directly on poverty than generally on social stratification. According to this view, poverty exists because it serves certain positive functions for our society. Herbert Gans (1972) described fifteen

sets of functions, including the following: (1) poor people do the dirty, dangerous, menial, and undignified work that other people do not want to do; (2) programs that help poor people provide many jobs for the people employed by the programs; (3) poor people purchase goods, such as day-old bread and used clothing, that other people do not wish to purchase and thus extend the economic value of these goods; and (4) poverty helps to maintain the status of nonpoor people (Gans, 1972). According to Gans' argument, the middle and upper classes have a personal stake in neglecting poverty to maintain their status and perpetuate/naturalize poverty through their lack of interventions. Later, in 1995, he further developed poverty's positive functions and connected it to deserving and undeserving poor people (Gans, 1995).

In Central and Eastern Europe, several studies have measured Roma poverty and described inequality in a way that inherently creates a market-friendly condition for economic growth by supporting the status quo and abandoning interventions to eliminate extreme inequality. I think those studies that simply measure the poverty of the Roma without a wider relation to macro-political economies and without considering the context and ability to convert income poverty to a more complex system of access to various services and social goods support the social hierarchy. This approach implicitly accepts social inequality as a normative foundation of the market-driven capitalist society. I also consider a functionalist approach when mainly anthropological studies embellish the poverty of the Roma by the distinctive Romani culture, thus legitimizing inaction and exonerating policymakers to address long-term deprivation.

Structural theories

Structuralism refers to macro theories and their prime assumption that human behavior must be understood in the context of the social system (social structure) in which it exists. People in poverty are not independent actors with neutral values, nor are they just making independent decisions; their behavior is shaped by the social forces and conditions in which they live. This approach is exemplified by Marxist scholars, for whom those institutions, culture, and ideas, which they term the superstructure, cannot be understood separately from the basic social structures of capitalist society. These ideas are sometimes criticized as a top-down, deterministic approach focused on structures and institutions rather than individuals. Structuralist scholars prefer positivist methodologies, mainly quantitative data collection and analysis, that offer a quantifiable solution for describing but not analyzing the dynamics of poverty(Emigh and Szelényi 2001).

Synthesis of structural and cultural forces

William Julius Wilson—who has been highly debated in Central and Eastern Europe—succinctly identified *social structure* as social positions, roles, and networks of social relationships that are arranged in various social institutions such as the economy, polity, education, and the organization of family (Wilson, 2010, p. 201). According to his definition,

> *social structure* could be a labor market that offers financial incentives and threatens financial punishments to compel individuals to work; or it could be a "role" associated with a partner social position in an organization such as a church, family, or university (e.g., pastor, head of household, or professor) that carries certain power, privilege.
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> (Wilson, 2010, p. 201)

Regarding poverty, the impact of social, economic, and political structures creates a specific social circumstance that affects human behavior. When discussing the poverty of racialized groups, Wilson suggested distinguishing two types of structural forces, namely, *social acts* and *social processes*, noting, "The term *social acts* refers to the behavior of individuals who occupy particular positions within society" (Wilson, 2010, p. 201). These acts are the specific incidents in which someone is stigmatized, racialized, discriminated against, or excluded in various forms of actions, such as hiring, job promotions, and admission to educational institutions. The other structural forces are *social processes*, which refer "to the '*machinery*' of society that exists to promote ongoing relations between members of the larger group" (Wilson, 2010, p. 201). Here, Wilson refers to the racialized processes that institutionalize and solidify racial discrimination and exclusion. Racialized group differences are embedded in institutional structures, mechanisms, and policies, so according to Wilson, poverty-related research must pay attention not only to the direct and visible forces of racism, discrimination, and segregation but also to the indirect political and economic forces that contribute to racial exclusion. Wilson's contribution synthesizes structuralist and culturalist approaches by offering a holistic approach[1] that recognizes the complicated matrix of structural and cultural factors that create and reproduce racial inequality (Wilson, 2010, p. 214).

Wilson's earlier publications (1978, 1987) sparked heated discussion among scholars who conducted Roma-related research. He also theoretically influenced the research carried out by Iván Szelényi and his research partners in Central and Eastern Europe in the late 1990s. Szelényi and his group were confident that the "transition from socialist redistribution to capitalist markets offer an ideal site to consider hypotheses about the relationship between markets, inequality, and poverty" (Emigh, Fodor, and Szelényi, 2001, p.11).

Underclass debate

Szelényi and his research team (Emigh, Fodor, and Szelényi, 2001) used the concept of "underclass" mobilized by Wilson (1987) and originally coined by Gunnar Myrdal (a Swedish and multinational economist) for the American public in his 1963 book called *Challenge to Affluence* to describe the victims of deindustrialization/postindustrialization. His short, rather explanatory definition of "underclass" "is an "underprivileged class of unemployed, unemployable and underemployed who are more and more hopelessly set apart from the nation at large and do not share its life, its ambitions, and its achievements" (Myrdal, 1963, p. 10). Myrdal did not refer to this population's race, gender, or any other cultural-behavioral characteristic than

what implies their hopelessness and destitute situation. Moreover, Myrdal shows the social and economic gap between those living in long-term concentrated poverty and those who are better off. In his seminal book, Herbert J. Gans (1995) analyzes the origins and racialization of the term "underclass" in US public discourse. His fears and concerns have been transferred and vigorously used by scholars in the region who have argued against the application and extension of the underclass in postsocialist countries while concealing the devastating process of racialization and structural racism.

Michael Stewart proposed one of the most publicly articulated critiques (2001, pp. 133–155), formulating four stark arguments against the theoretical framework and terminology of "underclass". (1) He articulates a cautionary note that the concept of "underclass" has been used and misused by the American new-right rhetoric to attack those who are "welfare dependent" and those who are involved in criminality (Stewart, 2001, p. 137). He suggests using terminology that is conceptually and politically more neutral, such as "*social exclusion*". (2) Stewart critiques the conceptual language borrowed from American social science, such as "ghetto" and "underclass", and shows the differences between the Black population in the United States and the Roma in postsocialist countries. (3) He deploys several examples from history to demonstrate that, over the centuries, unemployment, poverty, and social exclusion have always been presented as social problems; however, they have always been solved by economic growth and social transformation as well as the flexibility and resilience of the Roma to survive. (4) He suggests that the application of "underclass" exaggerates the situation of the Roma because they can refute the assumption of classifiers by proving that the Roma can survive and use "cultural resources" to find their way in a difficult situation.

In response, János Ladányi and Iván Szelényi (2001a) offered a detailed and sharp answer to Stewart's critique, which is summarized as follows. First, they explicitly reject the idea of a "culture of poverty" that makes the Roma responsible for their own poverty. Second, they associate with scholars from Gunnar Myrdal to Julius Wilson, who reject the "culture of poverty" theory based on essentialism. Third, they explain that they are using the concept of "underclass" to explain the racialized structural changes that lead to their marginalization. Fourth, they understand Stewart's concern that the concept of "underclass" could be misused; however, they believe that the majority population projects their prejudice toward the Roma and makes them responsible for their situation. Hence, the Roma is used as a scapegoat to explain social problems. Therefore, the question is not who is responsible for the abuse of the category of "underclass" but rather how scholars use it.

Contrary to Stewart's fear, Ladányi and Szelényi (2001a) understand the concept of explaining the process of racialization in which social and ethnic disadvantages intersect and create a specific mechanism that renders the Roma at the bottom of the social hierarchy. They also reveal that structural and behavioral advantages and disadvantages always occur in highly complex interactions, whereas structural advantages are more decisive than behavioral advantages. Poverty, long-term employment, social stigmatization, and racial discrimination have behavioral consequences that can be modified and changed through structural changes. Moreover,

one of the main critiques of the perspective that is explicitly represented by Stewart is that it undermines the racialization of Roma by rejecting any conceptual framework and concepts such as "underclass" that would unveil the deeply racialized structural process. The authors criticize that such approaches offer a rather neoliberal solution to the problem by emphasizing the (automatically) corrective measures of the market to alleviate poverty and suggesting a more neutral concept of "social exclusion", which conceals the process of racialization.

Szelényi and Ladányi (2001a) used their research results to elucidate the underclass formation that is linked to the economic integration of postsocialist countries and refuted the corrective nature of the market by emphasizing the following:

> Based on our representative research in 2000 carried out in Bulgaria, Hungary, and Romania, we asked people, who identified themselves as Roma, whether they are starving. In Bulgaria, 70 percent; in Hungary, 25 percent; and in Romania, 70 percent of the sample answered yes. To the question of whether they are living better or worse in 2000 compared with 1988. In Bulgaria, 88 percent, in Hungary, 74 percent, and in Romania, 83 percent stated that they lived worse in 2000 than in 1988. According to the World Bank measure, 56 percent of Bulgaria, 53 percent in Hungary, and 65 percent in Romania of Roma lived under the poverty line (in the non-Roma population, this was around 10 percent who lived under the poverty line).
>
> (Szelényi and Ladányi, 2001a, p. 98)

The underclass debate from the early 2000s is significant, and I have paid more attention to it because it has influenced the poverty-related Roma research trajectories, which centered more around the concept of "social exclusion". This debate also resonates with William Julius Wilson's reflection on how public discourse changed in the United States in the 1970s and 1980s regarding the perception of spatial concentration of poverty by the neo-conservatives (Wilson, 1987, pp. 3–19). Hence, Democratic left-liberal scholars and experts had difficulty articulating their position. As he explains, "liberals became increasingly reluctant to articulate and publicly debate the desperate situation in inner-city ghettos. Their reaction was confused and defensive" (Wilson, 1987, p. 15). In his analysis, Wilson tried to reconcile the dilemmas that have been created by the essentialist, culture-centric neo-conservative interpretation of entrenched poverty by providing an alternative explanation, as Szelényi and his research team did, by making a stronger claim that underclass formation in Central and Eastern Europe is linked to the process of racialization (Emigh, Fodor, and Szelényi, 2001, p. 5.) The latter strongly argues that

> the process of racialization, the presentation of a social phenomenon such as poverty as if it were biologically determined, may lock certain groups into underclass positions. When an ethnic minority is concentrated in poverty, there may be a tendency toward the formation of an underclass if poverty is racialized.
>
> (Emigh, Fodor and Szelényi, 2001, p. 5.)

Contrary to the moralizing neo-conservative interpretation, underclass theory attempts to problematize the detrimental racialized structural forces on individual behavior, which has been treated as taboo by color-blind social theories.[2]

Roma poverty conceptualized by international organizations

International organizations' approaches to Roma poverty have always reflected their institutional mission and ideological standing. The World Bank specifically theorized Roma inclusion as a "developmental challenge" and "macroeconomic necessity" in Europe (Ram, 2017, p. 567). In 2005, in the spirit of developmentalism, the World Bank co-founded the Decade of Roma Inclusion (2005–2015) with the Open Society Foundation.

In their declaration, the Decade of Roma Inclusion stated, "The Decade is a political commitment by countries to reduce disparities in key economic and human development outcomes for Roma through implementing policy reforms and programs designed to break the vicious cycle of poverty and exclusion" (Declaration, 2005). After ten years, Bernard Rorke (2015) critiqued the Decade of Roma Inclusion as an initiative that could not deliver the social, economic, and structural transformation that was needed "to lift millions [of Roma] out of poverty, undo centuries of exclusion, and eliminate popular prejudice and structural discrimination" (Rorke, 2015, p. 61). However, he recognizes that the Decade was an essential step in framing poverty in policy terms and placed on the European political agenda by the founders and the participating member states[3] with the support of numerous international organizations.[4]

The UNDP, Regional Center in Bratislava, was one of the founding international organizations that established a research framework of Roma poverty and provided a conceptualization for approaching sectoral (employment, education, health, and housing) and crosscutting (anti-discrimination, gender-equality, poverty-reduction) issues. The UNDP research from 2002 entitled *The Roma in Central and Eastern Europe: Avoiding the Dependency Trap* (UNDP, 2003) became the basis for monitoring and developing comparable and disaggregated data in the participating states over the Decade of Roma Inclusion. The UNDP ambitiously set the tone by forecasting the institution of the Decade and emphasizing the importance of Roma inclusion in the EU integration process, which must be guided. As stated,

> Without proper integration and an overall development framework to guide the process, the opportunity provided by EU accession may quickly disappear. The risk is that, if postponed, the cost of finding solutions for marginalized groups will be immeasurably higher and will have few chances of success.
>
> (UNDP, 2002, p. 5)

Furthermore, the report implied a securitization of the marginalization of the Roma by emphasizing that "The human security costs of exclusion will spiral, potentially resulting in political extremism and setbacks for the democratic process" (UNDP, 2002, p. 5).

Furthermore, the UNDP provided subtle support to dismantle welfare provisions that strengthen the assumed poverty dependency of the Roma, as explained:

> Roma household incomes are highly dependent on welfare payments and other central government transfers (e.g., pensions of child benefits), while participation in the formal economy is relatively limited. This makes Roma's participation in social protection systems asymmetrical (i.e., as a group, they receive more than they pay). This asymmetry is an important cause of social tensions and, ultimately, exclusion.
>
> (UNDP, 2002, p. 6)

While the report provided important data for analyzing poverty and quality of life for the Roma over five countries, their theoretical approach assumed that generous welfare and provisions trigger moral hazards and welfare dependency, which ultimately discourage work and create conflicts. This approach resonates with poverty scholars who have studied how incentives influence the behavior of people in poverty (for example, Katz, 2013; O'Connor, 2001). These studies test and explain whether welfare support triggers moral hazards and welfare dependency. The 2002 UNDP foundational research regarding household incomes and poverty focused on understanding the link between sources of household incomes and dependency on social welfare payments and was directed by questions such as "What is the magnitude of dependency on social welfare? How does it affect recipients' life strategies? What is the impact of this dependency on relations with the majority populations?" (UNDP, 2002, p. 39). The underlying theory of the UNDP has remained within the scope of behavioral-cultural theories that tend to present welfare incentives as the primary source of dependency without discussing market-driven exclusions and inefficiencies or a lack of welfare provisions. Their approach is intertwined with neoliberal efforts to legitimize the strip down of the welfare system that presumably fosters a "dependency culture" (UNDP, 2002, p. 51).

The publication of the UNDP in 2002 significantly contributed to the subsequent reports of the World Bank (Ringold et al., 2005), which, in addition to the bulk of statistical data that has supported the recurring arguments about the poverty of Roma, also suggested the idea that economic growth and a self-regulated free market will revive the economy in postsocialist countries, which will then trickle-down to address poverty even in the lowest segment of society (Deepak, 2013). At the same time, the UNDP transferred "human development frameworks" into Roma-poverty-related discussions in Central and Eastern Europe from developing countries. This trope of argumentation stems from Amartya Sen's (1999) seminal research on capabilities and associated human development frameworks that have highlighted the significance of women's agency, which must be fostered by education and employment. Women's status can influence the overall social well-being of their marginalized communities, and international organizations have widely advocated this belief through the discourse of the "empowerment of Romani women".

In the 1990s, the World Bank made alleviating poverty its top priority, which converged with the turn toward market-friendly structural adjustment practices that adopted an extremely narrow global poverty line. Jason Hickel (2019) sharply critiques the calculation of poverty lines from a political, economic, and methodological perspective. He explains that the dominant model of poverty reduction, which is supported by international organizations such as the World Bank, is based on the idea of the need to generate economic growth regardless of the extent of inequality. Hickel succinctly argues,

> While the majority of new income produced by growth is captured by the richest (the richest 1 percent captured 27 percent of net income from 1980 to 2016), the hope is that a sufficient amount will 'trickle down' to the poor. (Hickel, 2019, p. 417)

He also critiques the World Bank's poverty line that has been applied in the region (Malmberg et. al., 2000), which does not reflect basic human needs, health, or even survival. Based on this consideration, the expert used the higher poverty line of $4.30 per person per day to show the disparities between countries and between Roma and non-Roma within the countries.[5] Hickel demonstrated that the lower poverty line of $2.15 used by the World Bank in 2003 did not provide basic survival nutrition but obscured the extreme inequality between the Roma and non-Romani people. Therefore, at the poverty line of $4.30, 80% of Roma households in Bulgaria, 40% in Hungary, and almost 70% in Romania are poor. The difference between the Roma and non-Roma is greater in Hungary than in Romania or Bulgaria. In Hungary, 40% of Roma households are poor, compared to 6.9% of non-Roma households. The World Bank Study concluded that the "main correlates of poverty for Roma and non-Roma alike are the employment status of the head of the household, educational achievement of the household head, and the number of children" (Ringold et al., 2003, p. 30), without problematizing or reflecting on the deep structural inequality of postsocialist capitalism. However, the study acknowledges that the probability of being poor is greater for the Roma than for non-Roma, regardless of their level of education and employment status (Ringold et al., 2004, p. 31).

As noted by Melanie H. Ram, the World Bank's commitment was mainly pushed by the diligent analytical work of its staff members (Ram, 2017, p. 570). Their most significant study was published in 2000 in the *Roma and the Transition in Central and Eastern Europe* (Ringold 2000), which was followed by *The Roma in an Expanding Europe: Breaking the Poverty Circle* (Ringold et al. 2005). Both reports present the situation of the Roma as a population trapped in poverty and welfare dependency and consider both obstacles to their social inclusion. A lack of critical interrogation of the market transition to capitalism, deindustrialization, structural unemployment, or any other related effects that accelerated the precarious situation of the vast majority of Roma after 1989 have led to a noncomprehensive understanding of social exclusion. The report *The Roma in an Expanding Europe: Breaking the Poverty Circle* explains Roma poverty in the following way:

> ”For several interwoven reasons, Roma poverty is rooted in their unfavorable starting point at the outset of the transition from planned to market economies. Low education levels and overrepresentation among low-skilled jobs led to disadvantages on the labour market, which are compounded by discrimination and low expectations of employers. Roma have thus had more difficulty re-entering the job market than other groups and have become caught in a vicious circle of impoverishment. Additional barriers include a lack of access to credit and clear property ownership. These factors, combined with an *overdependence on welfare, create a poverty trap that precludes many Roma from improving their living conditions or starting their own businesses.”*
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> (Ringold et al, 2005, xiv–xv, emphasis added).

Following the rhetoric of the World Bank report, the poverty and dependency of the Roma on social welfare are complex and extensive, and changing these aspects would be complicated. The main obstacles are the disadvantages and labor discrimination of Roma without any critique of the exclusionary social and economic forces of market capitalism. These policies suggested by the World Bank align with neoliberal governmental technologies that rely on self-responsibilities, activation, self-empowerment, and self-reliance, which undermine state-supported collective welfare protection.

Later, in 2011, the Regional Roma Survey 2011 was a collaboration between the UNDP and the European Union’s Fundamental Rights Agency (FRA) with the support of the World Bank and the European Commission (Directorate General-Regional and Urban Policy). Two complementary surveys were conducted to map the current socio-economic situation of Roma households in select EU and non-EU countries. The first was implemented jointly by the UNDP, the World Bank, and the European Commission, and the second was the FRA Roma pilot survey, both of which were conducted in 2011 and included a common core component addressing key questions of education, employment, housing, health, free movement, migration issues, and discrimination experiences. The UNDP survey focused on social and economic development aspects, and the FRA survey focused on the fulfillment of key fundamental rights. The surveys applied the same sampling methodology across countries, allowing for the development of a common dataset on core indicators. Notably, the 2011 survey was designed based on the conceptual approach developed in 2004 by the UNDP in its first comprehensive regional survey of Roma at risk of marginalization and non-Roma living proximity (UNDP, 2014).

In addition to the 2011 survey, the UNDP Bratislava Regional Center as a multilateral collaboration with the Center for Policy Studies (CPS) at Central European University (Budapest, Hungary) and two programs of the Open Society Foundations (Roma Initiatives Office and Making the Most of EU Funds for Roma program) engaged in a discussion about shaping European policy debates and knowledge on the Roma, thus acknowledging that a contextual inquiry on the key factors perpetuating Roma marginalization at the municipal and community level would contribute to the value and the exploratory power of these 2011 household surveys (Szalai and Zentai, 2014). These centers and programs selected three countries:

Hungary, Romania, and Serbia, including several municipal and local communities, to explore the economic, political, demographic, and social forces that shape practices and consequences of social exclusion and potential pathways to inclusion. The Romanian country report prepared by Enikő Vincze and her research team was highly articulated and nuanced on how racialization affects the reproduction of marginalization. As she explained, "Roma are rarely considered as 'ethnic other', but instead are inferiorized as 'another race' that is radically different from 'us' (civilized ethnic Romanians, Hungarians or Germans)" (Vincze, 2014, p. 94).

Poverty of the Roma through the lens of racial capitalism

Neoliberalism has a contradictory Janus face. On the one hand, it perceives poor, marginalized people as free agents who have the ability and capacity to escape poverty via the market (Katz, 2013). In this regard, this vision could seem very empowering because it rejects cultural pathological theories and perceives poor people as being equal to the rest of society. This "positive" approach is based on the logic that everyone is a free and equal agent who can make a market-driven decision that ultimately improves their lives. Therefore, according to this theory, poor people are free to do the same as others do. On the other hand, neoliberalism constructs poor people as deficient, immoral, undeserving individuals who do not take full responsibility for their own fate (Feldman, 2019). As Katz (2013) explains in his seminal work, the undeserving people constructed by neoliberalism do not deserve compassion and sympathy because they brought their poverty on themselves, either through laziness and immorality or because they are culturally or mentally deficient. According to this extensive view, poverty is a personal failure that legitimizes the lack of welfare and desensitizes middle-class people to providing support and solidarity.

Over the last three decades, significant "social investment" as an anti-poverty strategy has been evaded, targeting those who are deeply stigmatized as undeserving/racialized poor, such as the Roma population in Central and Eastern Europe. Vincze succinctly explained that in postsocialist Romania, the inclusion and exclusion of the Roma aligned with the global trends of neoliberalism, and "inclusion and exclusion (of Roma) reflected a new social order, which has also manifested in spatial (urban) arrangements" (Vincze, 2014, p. 95). This trend creates the order of privileges and refusals. The order of privileges includes those who win the privatization and marketization of public goods and incorporates people, places, and societal areas that might bring profit to capital. This constitutes a population and a geographical location that deserve development and are worthy of social and financial investment. In contrast, there is an order of refusals in which people in power classify poor people as "surplus", "redundant", or "needless" who can be exploited and neglected. Furthermore, they do not receive investments or development projects (Vincze, 2014, p. 96). Hence, developmental policies and programs are mainly created as an opportunity for the middle class to participate in these projects as managers, professionals, and trainers and are likely to recruit target groups that "deserved to be invested". Consequently, those who are living in extreme poverty

and perceived as undeserved are unlikely to be identified as targets of developmental programs. This logic has sustained and reproduced the radical poverty of marginalized Roma by delegitimizing their participation in social investment. Vincent Fang argues that we need a radical shift from general anti-poverty programs that function as a charity paradigm,

> which centers on goodwill-based private and official donations, to a justice paradigm, where it is widely recognized that extreme poverty is a grave injustice in an affluent world and requires extensive institutional reforms, active civic participation, and possibly global wealth redistribution to be eradicated.
> (Fang, 2021, p. 46)

This justice-centered approach transcends national borders and resonates with Nancy Fraser's theoretical frame of triad dimensions: redistribution, recognition, and representation (Fraser, 2005). Fraser's triad dimensions proved highly relevant to Europe's Roma population (van Baar and Kóczé, 2020, p. 328). On the one hand, social and economic restructuring deteriorated structural violence against the Roma in the form of entrenched, racialized poverty. On the other hand, it provided a human rights-based approach and cultural emancipatory discourse to enhance the politics of recognition with limited participation[6] in policy and decision-making. Since 1989, there has been a dominant trend in Roma-related affairs in the postsocialist context, namely to decouple the politics of recognition from the politics of redistribution and participation (van Baar and Kóczé, 2020). However, the logic of decoupling has created one-sided, either/or binary choices that lack a comprehensive understanding of the situation.

Nancy Fraser's three-dimensional approach is an essential frame of reference for discussing the failures of redistribution, recognition, and representation of the Roma in the broader context of postsocialism and neoliberalism. Building on Fraser's concepts and connecting them to the racialized poverty of the Roma in Central and Eastern Europe provides a new conceptualization that advances our understanding of how neoliberal racial capitalism generates and reproduces inequalities, marginalization, and exclusion, thereby fostering and consolidating racialization (Fraser, 2016). Moreover, Fraser's approach differs from the exploitation-centered conceptions of capitalism, which, according to her, "can illuminate its persistent entanglement with racial oppression" (Fraser, 2016, p. 173). This nuanced approach helps us to understand the reproduction of extreme poverty in the era when "Roma inclusion" was high on the developmental agenda. As Fraser suggested, we need to expand our view of capitalism as an institutionalized social order that transcends a mere economic system and builds on expropriation, not exploitation.

Fraser's contemplation brings us back to the seminal work of Black scholars, such as Oliver Cox, Cedric J. Robinson, and others who have critiqued Marxism for failing to account for the racial character of (postsocialist European) capitalism (Kelley, 2017). The neoliberal racial capitalism that gradually unfolded in Central and Eastern Europe after 1989 imposed a systemic condition of crisis

and structural violence that rendered and normalized the vast majority of disenfranchised Roma as racialized "subhumans" and "nonhumans". In Central and Eastern Europe, the vast majority of Roma still face massive inequalities regarding education, employment, housing with running water, access to health care, far greater exposure to environmental disasters and poisoned water, and much more. Neoliberal capitalism has failed to deliver on its promises of equality and equal opportunity for the Roma through the ethos of meritocracy and competitiveness, which does not account for historical injustice and accumulated structural violence.

Conclusion

This chapter provides an overview of the theoretical conceptualizations of Roma poverty, categorizing the dominant approaches and their intersectional dynamics such as *culturalist*, *functionalist*, and *structuralist.* These general poverty-related theories have informed and shaped explanatory frameworks that explained the poverty of the Roma in Central and Eastern Europe. In most cases, there is a strong culturalist influence that contributes to the naturalization of Roma poverty. Furthermore, international organizations such as the UNDP and the World Bank, in addition to providing a rich dataset for policy-making and monitoring, have strengthened the idea that economic growth and a self-regulated free market will revive the economy in postsocialist countries, which will address poverty and consequently improve the situation of the Roma. These attitudes have discouraged the use of address exclusionary mechanisms and delayed affirmative intervention.

The neoliberal racial capitalism that gradually unfolded in Central and Eastern Europe after 1989 imposed a systemic condition of crisis and structural violence that rendered and normalized the vast majority of disenfranchised Roma as racialized "subhumans" and "nonhumans". The theory of racial capitalism provides a conceptual language to diagnose the massive inequalities that the majority of Roma face in terms of education, employment, housing with running water, access to health care, far greater exposure to environmental disasters and poisoned water, and much more. In this volume, the complex approach of the PRECWORK project highlights a more historically embedded social stratification, generational educational disinvestment, and asymmetrical power relations that help to describe the racialized trajectories of the Romani people.

Notes

1 Wilson defines *culture* as "the sharing of outlooks and modes of behavior among individuals who face similar place-based circumstances (such as poor, segregated neighborhoods). Therefore, when individuals act according to their culture, they are following inclinations developed from their exposure to the traditions, practices, and beliefs among those who live and interact in the same physical and social environment (Hannerz, 1969). This definition is not limited to conceptions of culture defined in the simple and traditional terms of group norms, values, and attitudes toward family and work. It also includes cultural repertoires (habits, styles, and skills) and the microlevel

processes of meaning-making and decision-making that is, the way that individuals in particular groups, communities, or societies develop an understanding of how the world works and make decisions based on that understanding" (Wilson, 2010, p. 202).

2 Dena Ringold, World Bank Human Development Economist for Europe and Central Asia Region, confirms that both the growing quantitative household surveys and qualitative studies show that the Roma are overrepresented among poor people. She succinctly states that "Regardless of methodology, data quality and comparability across countries results are similar. Even in countries with significant shares of other ethnic minorities, Roma are more likely to be among the poorest groups in the population" (Ringold, 2002, p. 31).

3 Bulgaria, Croatia, the Czech Republic, Hungary, Montenegro, Romania, Serbia, Slovakia, and the former Yugoslav Republic of Macedonia. In the following years, Albania joined the Decade in 2008, and Bosnia and Herzegovina and Spain joined in 2009. Slovenia, the United States, and Norway joined the Decade as observers in 2009, 2012, and 2013, respectively.

4 The founding international partner organizations of the Decade were as follows (in alphabetical order): the Contact Point for Roma and Sinti Issues of the Office for Democratic Institutions and Human Rights of the Organization for Security and Co-operation in Europe, the Council of Europe, the Council of Europe Development Bank, the European Roma Information Office, the European Roma Rights Centre (ERRC), the European Roma and Travellers Forum, OSI, UNDP, and the World Bank, with the European Commission participating from the beginning of the Decade as an observer. While the Roma Education Fund (REF) has served as an international partner of the Decade since its establishment in 2005, international partners joining later included the European Network Against Racism, the Forum of European Roma Young People, the International Romani Union, the Office of the United Nations High Commissioner for Refugees (UNHCR), the United Nations Children's Fund (UNICEF), the World Health Organization (WTO), and the United Nations Human Settlements Programme.

5 Based on the expert's opinion, the higher $4.30 absolute poverty line is more appropriate than the lower line in 1990s postsocialist countries.

6 Huub van Baar and Peter Vermeersch (2017) critically conceptualize the limited representation of the Roma as "operational representations" which are "discursive, visual, and material frames that contribute to making the Roma 'visible', 'legible', and 'governable'". This situation leads to the 'avisuality' of Roma in which Roma are made visible but nevertheless remain in certain ways overlooked and ignored. The term of 'avisuality' was coined by media scholar Akira Lippit (2005, p. 32, cited in van Baar and Vermeersch, 2017, p. 131).

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