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## **Cross-Cultural Education and Housing Policy in Roma – non-Roma Relations: Case Study of Management by Empowerment in Qualitative Perspective**

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**Abstract:**

**Purpose:** *The article presents a case study of managing the process of social integration of the Roma minority in Poland. In this context, the objective of the article is to present a critical analysis of key practical aspects of managing cultural clashes using the OMC method and pay attention to the usefulness of applying qualitative methods for monitoring social integration processes.*

**Design/Methodology/Approach:** *The argumentation is based on an analysis of qualitative empirical material (160 in-depth qualitative interviews) related to the application of the European OMC model in managing relationships with the Roma minority at a local level.*

**Findings:** *The qualitative OMC methods for monitoring processes allow for obtaining an alternative image of the course of management processes.*

**Practical Implications:** *Actual practical implementation of an in-depth approach of the qualitative expertise in the OMC will contribute to more efficient and more thoughtful solving of social problems at cultural crossroads.*

**Originality/value:** *Based on empirical data, the author argues that, in the case of solving complex social problems related to the education of adults, the application of thorough methods having a qualitative nature is a useful diagnostic tool used in the process of managing the development of local communities. The argumentation is based on a qualitative analysis of a vast and unique empirical material.*

**Keywords:** *Education and inequality, Government Policy/Provision and effects of Welfare Programs, Education and Economic Development, Measurement and Analysis of Poverty.*

**JEL classification:** *I24, I38, I25, I32.*

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## **1. Introduction**

When managing the process of solving problems emerging in the relationships between cultural minorities and the majority society, the European Union is using a complex system involving the choice of a solution and its subsequent implementation, called the “Open Method of Coordination” [OMC] (Peters, 2018; Bieber, 2016; Lawn and Greek, 2012; Rhodes, 1997; Witkowski, 2016). Currently, the OMC is an element of organisational culture and decision-making practice of the EU in the area of social issues (Klatt and Milana, 2019; Szczepańska-Woszczyzna, 2018).

At the same time, according to the critics of the OMC, its evaluation in practice is often limited to quantitative indicators, concentrating on temporary effects, and it is not very thoughtful (Egeberg and Trondal, 2016; Heritier, 2002; Le Gales, 2016). In the following part of the text, based on the collected empirical data, I argue that, when solving complex social problems related to the education of adults, the application of more in-depth methods of a qualitative nature can be a useful diagnostic tool used in the process of managing the development of local communities. I address the qualitative empirical material related to the situation of the Roma minority in the EU. The main practical implication of the article consists of critical conclusions related to the existing OMC practice and a proposal of overcoming them.

The model for managing relationships with the Roma communities in the European Union is based on the OMC. It constitutes a basic semantic framework of institutional involvement of the EU and Poland in the practices of integrating the Roma. It is accompanied by a normative and pedagogical discourse, whose central elements are “social integration of the Roma” and “counteracting their social exclusion”. By design, the OMC leaves a considerable scope of decision-making freedom at a country level. In principle, the representatives of the Roma community and local government authorities should have significant autonomous participation in managing the policy of integration (Nadalutti, 2017; Peters, 2015).

In the process of determining the strategies of actions taken towards the Roma by EU institutions and the member states, there have been numerous instances of emerging conflicts related to the basic values; the elements of a traditional Romani life seemed at odds with the “European values” (Gheorge, 2013; McGarry, 2012). In the pedagogical literature, attention was paid to educational problems related to overcoming long-standing cultural Romani traditions: the practices of early Romani marriages, the traditional inequality of women and men, or certain behaviours on the labour market. In such a situation, how should one manage intercultural relations in practice? In spite of the abovementioned doubts, Romani elites deemed OMC a convenient instrument for implementing their own group interests (Vermeersch, 2006; Barany, 2002; Marushiakova and Popov, 2005; Witkowski, 2016; Mirga and

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Gheorghe, 1997; McGarry, 2008). It can be assumed that contemporary European policy of the EU towards the Roma is based on several axioms indicating the necessity to take actions with respect to intercultural education:

1. The current social and economic situation of the Roma in the European Union is unacceptable for moral and economic reasons.
2. The worse the economic situation of the Roma, the stronger the stereotypes and prejudices against them.
3. The Roma community: weak, lacking political influences and socially marginalised, is subject to prejudice and discrimination.
4. Prejudice and discrimination undermine the integrational efforts of the Roma themselves.
5. The primary means of improving the situation of the Roma should be the policy of strengthening their social and material position, the so-called empowerment (Liegeois, 2007; 2012).
6. In order to strengthen the community, it is necessary on the one hand to improve the material situation of the Roma (in particular in terms of housing), and on the other hand to initiate firm educational activities, which will lead to weakening the stereotypes and prejudices hindering further economic development of this community.

## **2. Research Method**

The conclusions presented in the text have been formulated based on long-term studies performed in the years 2011–2020 using ethnographic methods, an in-depth qualitative interview (90 interviews with the Roma, 50 with their non-Roma neighbours, 14 officials of the central and local level, 6 employees of non-government organisations undertaking activities for the Roma) and observation of the participant. Most ethnographic materials were collected during field trips to the so-called Romani settlements located in the Polish Carpathians. Currently, in southern Poland there are about 20 Romani settlements located near mountain villages.

The numbers of the Roma living in such a settlement usually range from several dozen to several hundred people. In the subject literature, the inhabitants of the settlements are usually described as Bergitka Roma (Lubecka, 2005; Nowicka, 1999) or Carpathian Gypsies (Mróz, 2007). The key subject of my research was the totality of local relations between the Roma, the remaining inhabitants of the villages and the pursuers of the so-called Roma integration policy. A study of this type required learning and analysing various ways of thinking about managing the policy towards the Roma, which have an impact on the actual actions.

Therefore, a part (about 30 interviews) of the research material was collected in places distant from the Carpathian villages (particularly in Warsaw, where numerous decisions are made): in environments and institutions in which, according to the

OMC, the models of policy towards the Roma are being developed, as well as in non-government organisations implementing integration projects.

They included conversations with officials at the Ministry of Interior and Administration, institutions responsible for the organisation of contests for grants supporting the Roma minority, countrywide non-government organisations undertaking activities for the Roma community, and Romani leaders from outside the region. For a better understanding of the phenomena taking place at a local level, it has become necessary to consider the activity of the leaders of Romani non-government organisations and events observed in the media discourse. The present text uses only a fragment of the collected material, limited virtually to a single episode related to the implementation of integrating actions in one of the Romani settlements. I argue that, through qualitative analyses of this kind, we can considerably enhance the image of reality obtained solely on the basis of monitoring quantitative indicators.

All the acquired data – at least potentially – have a fragile nature; they can affect the lives of the research subjects in a manner which is hard to predict. I tried to present the research material in a way which would minimise this probability. I quote all the interviews in an anonymous version, omitting data which would allow for unambiguous identification. For most administrative and geographical units, I use fictional names.

According to the adopted research strategy, modelled on the concept of multi-sited ethnography of George Marcus (1995), the data was also acquired in numerous other situations, sometimes at a considerable spatial distance from the Carpathian villages in which the Romanian settlements are located. The research included an analysis of consulting procedures under the OMC and an analysis of the discourse of official documents about the situation of the Roma in Europe.

### **3. The Theory and Practice of the OMC: The Organisational and Pedagogical Aspect**

The operating mechanism of the OMC can be described as a manner of “producing agency and results of actions” (Williamson, 2016; Zaitlin, 2011; Rhodes, 1997). Strategic goals are formulated at the highest level of decision making, during sessions of the European Councils and meetings of the Council of Ministers. They are the result of a shared political will, but they are earlier preceded by the “development process”, in which proper agendas of the European Commission are involved. In principle, the objectives are defined in such a manner which would not force specific ways of their implementation, i.e., they can be indicated as the “convergence of goals”.

An element allowing for control of the management process is the selection of

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uniform indicators and methods for collecting and interpreting the data which enable determining the scale of the expected change, followed by the results achieved at the level of individual member states (or lower). It is believed that constant control is a necessary condition for proper operation of the system.

Therefore, complex procedures have been created for periodic reporting, assessing reports, and subsequently addressing the assessments. Also, direct meetings are also organised in a top-down fashion, along with other possibilities of exchanging information between the representatives of individual elements of the management system based on the open method of coordination, and any positive experiences are presented, discussed, and assessed during them (the so-called good practices). Walters and Haahr (2011) emphasise that the contemplated way of conducting the policy has been constructed based on very liberal assumptions – a management minimalism limited virtually to the “creation of conditions, under which [specific spaces and processes] can function by themselves, and the actors of the social scene – rule themselves”.

According to this vision, the key element is to replace a single decision-making centre with an increasing number of “autonomous communities”, having the will and ability to solve problems obstructing the achievement of one’s own good. The theoretically independent, temporary partnerships of individuals consisting of those who share a common fate and who remain loyal towards each other, are becoming political entities (Rose, 1996).

In order for this solution to work, it is the role of the one who has formal authority, described as the reigning, not the governing one, to “produce agency” and the “results of actions”. In this liberal, albeit, according to the assumptions, non-individualist reigning model, critical significance is being attributed to the ways of introducing “empowerment”, meaning the construction of social entities and top-down strengthening of their group position, enough to make them local centres of decision making. The society is becoming an area of energy which should be channelled; a space of overlapping communities and sectors, capable of generating solutions to their own problems (Walters and Haahr, 2011).

The manner of ruling in the EU can be called a way of reining via operationalisation (Le Gales, 2016). “Objective monitoring” of proper change indicators has become a strategic element of the management process. A report, as a key discourse-related control element, is based on the acquisition of data with the use of a methodology which is recognised in a given area and approved. To this end, the reports are reviewed by “social stakeholders” and “renowned experts”, meaning people recognised on the ground of the planned procedures as the representatives of the interested parties and people considered to be authorities in discourse.

The levels of indicators are the most important elements of a report, its final instance, with reference to which a decision is made. Questioning the adequacy of

using a given indicator at the moment of making the decision can mean terminating the discussion. In order to criticise or reject an “objective numerical indicator”, one must have thorough knowledge about the ideas and values related to its generation and context of application.

As the “technology of agency”, the methods for operationalisation of variables “depicting” the processes occurring in the EU used in the OMC are constructed on the foundation of assumptions agreed upon in a top-down manner, which at lower levels of the decision-making process are rarely subjected to a critical insight. In the terminology of governance, this process is called recurrence (Zeitlin, 2011).

On the other hand, in accordance with the pedagogical and moral perspective of the judgment analysis of Kwame Anthony Appiah (2008), all solutions and indicators adopted in the OMC implementation process can only be understood and assessed upon taking a look at the way in which directly involved social actors proceed, following their personal or contextual social motives. One should not expect from involved social actors the knowledge of the idea and the sharing of the same values which guided the creators of the system. It would be naïve to expect that people involved in actions in favour of the Roma community would pay attention to a number of situations, in which the idea of striving to social equality could come into conflict with the concept of affirmation of Romani cultural rights. Romani activists and European elites creating the shape of integration policy are trying to perform an intellectual and pragmatic synthesis of various strategies of actions for the Roma communities.

At this point, it should be explained how important a space for gaining influence on the course of events in the European OMC is the control of the language of reality description. The nature of the OMC is oriented at the development of solutions via a discourse-based search for a “rational” consensus on the grounds of communication principles generally shared in a political commonwealth (Habermas, 2009; Rhodes, 1997). According to Habermas, a rational discourse is one in which its every participant wonders whether a given solution is possible to accept when “looking through the eyes of each individual separately” among those who could be concerned.

As Habermas puts it (2009), the language is becoming the “greatest medium for the coordination of actions”. However, in practice, apart from rather exorbitant conditions for the existence of a rational discourse indicated by the author of the concept, it can be noticed that it works properly only when the discrepancies between the value systems of all parties to the discourse do not exceed a certain level. The experience of discourse pedagogy shows that, in matters related to basic differences between value systems dividing the cultures, there can be issues which, due to a culturally shaped world view, sometimes are not subject to compromise (Shweder, 1991; Shweder, 2003; Geertz, 2005).

#### 4. Between the European OMC and Local Social Pragmatics

In one of the villages of Podhale, a dozen years ago or so there was still a Romani neighbourhood, which consisted of about a dozen shacks serving the function of houses. It had very poor sanitation: there was no running water or sewage, and numerous houses had threshing floors instead of proper ones. Currently, in the same area one can spot two twin double-storey residential houses funded by the Ministry of Interior and Administration. They are inhabited by a Roma community of approximately 80 people.

In 2016, the central authorities recognised this municipality as an example of exceptionally good Polish-Romani relationships, and the head of the municipality was honoured and invited to a session of the Parliamentary Commission for National and Ethnical Minorities as the administrator of a municipality which handled the cultural clash perfectly. Among government administration, the municipality is an example of good management of the process of Romani integration and the development of good interethnic relationships by overcoming the stereotype of a poor, backward Roma. An equally positive opinion is shared by the activists of non-government organisations. The purpose of this investment was to support the Roma community, described as being at risk of social marginalisation.

However, the situations described below indicate that, although the house undoubtedly improved the material living conditions of the Roma, in practice it has led to the deterioration of local social integration. This phenomenon is difficult to capture by the quantitative indicators used for the needs of the OMC (e.g., the number of people belonging to the Roma minority living in houses with running water has been adopted as one of the indicators of achieving the goal of social integration of this group). To highlight it, I suggest a qualitative analysis of selected fragments of the investment's implementation at its various stages.

The Romani neighbourhood is placed in the central part of a village extending along a road, but also somewhat at the back, behind a river. Until recently, these areas were considered by local highlanders, the legal co-owners, as unsuitable for living due to the threat of flood from the river and the vicinity of a steep slope with falling pieces of soil. Today, the highlanders point out that their ancestors nonetheless condoned the settlement of the Roma. Until today, this matter has been a subject of dispute between the neighbours of the Romani district and the current head of the municipality, who believes that "no one was interested in this piece of land, since the Roma always lived here; it was problematic to find out who the owner was".

The land lot on which the house is built constituted a type of wasteland with a kind of co-ownership of the local highlanders which is difficult to ascertain – the so-called "partnership". The municipality has undertaken intense legal effort to enable the start of the construction. To this end, the previous owners, and people with possible claims to the land lot where the Romani settlement is located had to

relinquish their rights. Today, the non-Roma living near the Romani settlement believe that the entire procedure of handing the land over for construction was an abuse. They claim that they were misled when asked for the relinquishment of their rights, and everything was resolved in the courts quickly and effectively only because the Roma have “their hands in everything”. Considering that, from the standpoint of the OMC, the purpose of the new building was to increase the social integration of the Roma with the local community, strengthen their social position and weaken prejudice against the Roma, this situation raises controversies.

Therefore, from the standpoint of the OMC, how was the decision about building the Roma house in Ochotnica made? Government officials indicate that formally it was an initiative of the then-head of the municipality. This person points to the pressure of the Ministry of Interior and Administration (it happened in the years 2003-2004). Surely it was not an idea coming from the local Roma, who were surprised by the whole situation. About a dozen years later, a tale appeared around a “commission from the ministry”, which came to their neighbourhood and made the decision. A plan of the Roma house was developed in November 2004, and it provided the construction of a residential house with a total useful floor area of 575 m<sup>2</sup>, where 12 flats were supposed to be built. The plan was not consulted with the representatives of the Roma community.

The workers of the local Social Welfare Centre believe that, due to the lack of basic knowledge and experience in living in buildings of this type, it would be pointless to coordinate a project like this with the Roma. Moreover, the “investment cycle periods” were what mattered in the submitted application for the implementation of the investment and the settlement of the consecutive building stages, so any consultations would make the implementation of the project impossible.

Since the beginning of the project’s implementation, local government officials were struggling with a feeling of dissonance: if the Roma are to receive such a generous gift, why are they not participating in its construction? Therefore, attempts were made and are continued today to involve the Roma in the construction and further development of the building and the premises. The Roma could not participate in the construction carried out by the building company which won the tender.

However, the head of the municipality, responsible for the construction, and the head of the village asked the Roma for help during some secondary work, for example securing the purchased construction materials, clean-up work or levelling the ground around the house. Such participation could not be provided. According to the village head’s account, the Roma declared that they could work, but for the same money as Polish workers. This caused surprise and bitterness.

From a formal point view, the building is owned by the municipality, and the Roma live in it based on a loan. The head of the municipality firmly believed that without

the municipality's approval nobody could be registered there as an inhabitant. According to my observations, the officials of the municipality have little control on who actually dwells in the building, regardless of whether they are registered or not. Since 2011, the consecutive heads of the municipality have been planning for the Roma to establish a housing association in there, one which would operate the house, but as of 2020 this was not achieved.

The multiple-family house was built in two phases. The first part of the investment started in 2005 and ended in 2007: half of the flats were built and inhabited. The second part of the building was finished and inhabited in 2014. The building has twelve small flats. The flats were distributed according to a family key, but the assumption that it was supposed to be inhabited by 70 people meant about 8 individuals per an average flat of less than 50 metres (or about 8 m<sup>2</sup> per person). For comparison, according to the data of Statistics Poland, in 2013 the country average was less than 25 m<sup>2</sup> per person.

On the other hand, the legally established minimum standard of a flat in social housing (after all, this was the supposed nature of the building for the Roma families) is 5 m<sup>2</sup> per person. In a report of the Ombudsman's representative who visited the village in October 2014, the residential conditions of the Roma were assessed as "very good" (Łakoma *et al.*, 2014). It can be assumed that, from the standpoint of most Poles, the housing standard in the Romani building is low; however, compared to the previous living conditions of the Roma, the difference is huge. Compared to other living centres of the Bergitka Roma in the Polish Carpathians, the dwelling conditions of this community in the described village seem favourable.

The construction of the house for the Roma still raises controversies among the remaining inhabitants of the village. Some of them believe that "their Roma" should be helped. They quote stories proving the administration of such help. In particular, the inhabitants pay attention to the situation of children, who in their opinion "are not guilty after all". A councillor candidate says: "We look after our Roma well. They receive good care from us", and her further statements indicate that there is no irony in her voice, but it is an expression of the natural state of things. Others consider the construction of Romani flats to be moral abuse.

There is a general belief that the house was funded in a large part or entirely from the "union" money. If one considers the fact that the moment of planning the construction coincided with Poland's introduction into the European Union, it becomes obvious that the inhabitants have accepted the implementation of an investment which is unusual from the point of view of village life. For the inhabitants of the municipality, the source of financing is still a subject of debate (Becla and Tutaj, 2021).

The Roma declared that the construction of the house had been funded by "union"

money, “the money of our association they got from the Union”, and sometimes simply “their money”. Regardless of their declared belief that donating gifts to the Roma is harmful, since it rewards their passiveness and the ability to weasel, many non-Roma inhabitants of the village also believe that the Roma should be helped, or even that the assistance should be scaled up. The narrations about integrational abuse heard among the highlanders are piled up for the needs of contact with outsiders.

Any abuses caused by the Roma which happen during the integration projects are empirical, objective evidence of rejecting the good will of the givers. The assumed failure to reciprocate the integrational gifts serves the depreciation of the position with which the Roma are provided by the government support policy. It allows for a return to the traditional hierarchical disproportion of relationships between both communities.

According to the municipality head’s account, following his request, at a gathering assembled specially for this reason it was determined that the manner of moving into the first and second part of the house would be decided about by the Roma themselves. The problem lied in the sequence of moving the individual families; about seven years passed between the commissioning of both segments. Also, the flats had various sizes and favourable placement. It was also known that the settlement was inhabited by two main “feuding” family clans. To solve these problems, the head of the municipality proposed appointing a “commission” among the Roma, one which would be established by democratic voting.

However, the idea faced a protest and an argumentation that “the Roma never knew democracy”. In the municipality head’s opinion, the Roma reached an agreement “fairly amicably”, although during interviews in the settlement some of them more or less directly expressed their dissatisfaction, and paid attention to the fact that the leader of one of the local Romani associations played a decisive role in the allocation. During conversation, he claimed he was “in charge” of most Roma from the Ochotnica settlement, clearly presenting himself to the ethnographers as the defender and guardian of the fate of the local Roma. He presented his vision of a project, as a result of which the Roma would be given employment, and he himself would guarantee their presence in exchange for a paid position of a coordinator. He did not conceal the fact that he had participated in the distribution of flats; he even stated that he “did not want to let new people in here”, meaning the Roma from other settlements, because “the word was spread” that the living conditions in the new house are very good. The Roma unanimously stressed that there were not enough flats.

## **5. Conclusion**

The article presents a case study of managing the process of social integration of the Roma community in Poland. An analysis of practical aspects of managing cultural

clashes using the OMC method indicates a need to use qualitative methods for monitoring the processes of change. In the context of the presented data, the current practice of managing intercultural relationships using the strategy of empowerment may be an insufficiently thoughtful approach. None of the implementers of this policy in Poland surveyed by me (officials and project managers) were able to define a situation in which we could conclude that the integration of Roma communities has been fulfilled, or what this status would mean exactly. It was easier for my interlocutors to name phenomena occurring among the Roma, which they considered a problem (e.g., unemployment, alcoholism, the lack of education), and which according to them should be fought.

The ideas for overcoming the current state of things were usually based on common sense; social activists and decision-makers rarely reached beyond the narrow approach, which is based on indicators possible to calculate. As justification for their own actions, they usually provided the examples of successful projects and solutions. According to the logic of functioning of the system managing social processes in the EU, normative narrations about successes in the field of Romani integration have become a tool for legitimising the programme (in the OMC terminology, this is defined as benchmarking) (Szczepańska-Woszczyńska, 2021).

They provide the involved individuals with a feeling of sense in a quite uncertain endeavour that is the forging of changes in the lifestyle of the Roma communities. They allow for filling empty spaces in the manner of understanding the integration of the Roma, covering them with common sense-based concepts of relationships with the Roma communities. They are worth examining from the perspective of the standard-setting potential which they have for the involved actors. It should be kept in mind that everyone working for the integration of the Roma must reckon with the constant risk of being accused of racism, discrimination, and the use of harmful stereotypes. In each case we deal with the situation of constructing the interpretation of a situation while acting. What was originally improvisation is frequently presented as planned strategy. When doing their work, these people must perform specific tasks, for which they are accountable and responsible.

The pragmatics of actions based on combining the assumptions of the OMC with the achievement of measurable and documented change indicators is the most intriguing part of integration practices. In the context of the considerations presented above, it can be concluded that qualitative methods of monitoring the OMC processes allow for obtaining an alternative image of the course of management processes. As described based on qualitative empirical data, the situation in one of the Carpathian villages in terms of the implementation of the intended objectives of public policy is entirely different from what is presented in the prevalent public discourse, dominated by institutional entities of the OMC network. It seems that the actual practical implementation of the in-depth approach of the qualitative expertise in the OMC will contribute to more efficient and more thoughtful solving of social problems at cultural crossroads.

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