

Equality  
Mainstreaming  
A Perspective  
from the  
Equality Bodies

Equinet Opinions 2005-2006  
by Equinet's Working Group 4 on Policy Formation

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## Preface

This publication brings together the three documents that have formed the basis for the policy dialogue that Equinet seeks to develop with the EU Institutions. The documents have been prepared by Equinet as opinions on key EU policy initiatives. They focus on:

- ▶ the evaluation of the Open Method of Coordination in order to prepare for streamlining in the field of social protection (June 2005),
- ▶ the first EU high level equality summit (February 2006),
- ▶ equality mainstreaming (October 2006).

Equinet is the EU network of specialised equality bodies. The specialised equality bodies are independent bodies established by statute in the Member States to support the effective implementation of equality legislation.

These specialised equality bodies can bring a unique and necessary perspective to policy formation. This perspective draws on their particular mandate, expertise and experience at Member State level in implementing equality legislation.

A core concern that informs each of these three opinions is a focus on equality mainstreaming. Equality mainstreaming is defined by Equinet as the incorporation of a focus on equality, non-discrimination and diversity on the age, disability, gender, race, religion and sexual orientation grounds

- ▶ into all legislation, policies and programmes being designed and developed at all levels and at all stages of the design process,
- ▶ into the policies, procedures and practices of all institutions involved in the design and delivery of public sector policies and programmes.

Equinet poses equality mainstreaming as an important policy process that needs to accompany the effective implementation of equality legislation. Equinet also sets out that equality mainstreaming can only be sustained through making it a requirement through equality legislation and through regulations and guidelines that govern key policy processes.

These opinions have been prepared by a working group of Equinet established to implement the objective of Equinet to support the emergence of a dialogue between the institution of the European Union and the specialised equality bodies with a view to contributing to the inclusion of an effective equality focus in EU policies and programmes. The wider membership and Board of Equinet assisted in finalising these opinions.

In publishing these opinions, it is hoped to afford a profile to the contribution to be made by specialised equality bodies to policy formation at EU and Member State level. It is hoped to bring forward the analysis and policy thinking developed by Equinet to a wider audience. Finally it is hoped to emphasise the need to prioritise the further development of equality mainstreaming.

Niall Crowley  
Moderator of Equinet's Working Group 4



Equality Mainstreaming  
October 2006

## Introduction

Equinet welcomes this opportunity to provide this opinion on equality mainstreaming to the European Commission. The opinion is developed out of the experience and expertise of Equinet members in their roles as specialised equality bodies. We hope that the opinion will shape and inform the work of the European Commission on equality mainstreaming. We look forward to an ongoing dialogue with the European Commission on this important practice.

“Non-discrimination and equal opportunities for all – A framework strategy” was published by the Commission in 2005. This established a “forward looking strategy to promote non-discrimination and equal opportunities for all in the EU”. This emphasised the importance of positive measures “to compensate for long-standing inequalities suffered by groups of people who, historically, have not had access to equal opportunities”. It established mainstreaming non-discrimination and equal opportunities for all as a key element of the EU strategy and committed the EU to the “Development of tools to promote mainstreaming of non-discrimination and equal opportunities for all in relevant EU policies”.

2007 has been denominated by the EU as European Year of Equal Opportunities for All. The year is to provide an opportunity to promote a more cohesive society that celebrates differences within the framework of EU core values such as gender equality. The objectives for the year emphasise:

- ▶ rights and public awareness about EU legislation;
- ▶ representation and participation of under-represented groups in all sector and at all levels in society;
- ▶ recognition and the creation of a positive climate in which differences are valued;
- ▶ respect and the importance of promoting good relations between the various groups in society.

These objectives provide a useful framework within which to progress equality mainstreaming – or mainstreaming non-discrimination and equal opportunities for all. The year itself provides an important opportunity within which to seek real progress in implementing equality mainstreaming at EU and Member State level. The European Commission has developed a valuable commitment in that regard with the commissioning of a study on “Non Discrimination Mainstreaming Impact Assessment”.

Equinet is well placed to provide this opinion on equality mainstreaming as the European network of specialised equality bodies. Equinet was established to:

- ▶ contribute to the effective implementation by specialised equality bodies of their mandate through exchanging information and expertise on enforcement strategies;
- ▶ build an expertise on the dynamic interpretation of equal treatment legislation across the European Union;

- ▶ support the emergence of a dialogue between the institutions of the European Union and the specialised equality bodies with a view to contributing to the inclusion of an effective equality focus in EU policies and programmes.

## Equality Mainstreaming

Equality mainstreaming is about placing equality considerations at the heart of decision-making. It is a technical exercise. However it is important to establish clear objectives for equality mainstreaming. The implementation of the technical exercise of equality mainstreaming itself can all too easily end up as the objective.

Equality mainstreaming needs to be designed and implemented to achieve:

- ▶ cultural change among policy makers and programme planners through increased awareness and understanding of equality issues across the age, disability, gender, race, religion and sexual orientation grounds;
- ▶ institutional change within institutions that make and deliver policies and programmes through new processes for decision making that achieve better equality outcomes from policies and programmes;
- ▶ societal change in terms of improving the situation and experiences of groups experiencing inequality across the grounds of age, disability, gender, race, religion and sexual orientation through policies and programmes that have a capacity to achieve benefit for these groups.

With these objectives in mind equality mainstreaming involves the incorporation of a focus on equality, non discrimination and diversity on the age, disability, gender, race, religion and sexual orientation grounds,

- ▶ into all legislation, policies and programmes being designed and developed at all levels and at all stages of the design process;
- ▶ into the policies, procedures and practices of all institutions involved in the design and delivery of public sector policies and programmes.

Equality mainstreaming should be part of a dual strategy where it is accompanied by policies and programmes that specifically target human and financial resources on groups experiencing inequality across the grounds of age, disability, gender, race, religion and sexual orientation.

## Principles for Equality Mainstreaming

There are a number of principles that should guide the development and implementation of equality mainstreaming.

Equality mainstreaming should be:

- ▶ guided by a shared ambition for equality that is holistic in seeking equality in:
  - access to resources,
  - access to representation and decision making,
  - access to recognition and a status and standing for one's identity,
  - access to respect and relationships of trust, care and solidarity;
- ▶ evidence based in assembling relevant quantitative and qualitative data about the identity, experience and situation of each of the groups experiencing inequality. In this data gathering it will be important to respect particular sensitivities in relation to data collection on some of the groups and to reflect different cultures in relation to data collection across the Member States.
- ▶ supported through:
  - the development of tools to assist mainstreaming,
  - the preparation of data products, prepared with the requisite sensitivities set out above, that assemble existing relevant data for policy makers,
  - access for policymakers to expertise on equality issues and mainstreaming techniques,
  - provision of necessary human and financial resources to implement equality mainstreaming,
  - access for policymakers to training on equality issues and mainstreaming techniques,
  - leadership at political and administrative levels that effectively communicates the need for and importance of equality mainstreaming;
- ▶ integrated into existing legislative development, policy making and decision making processes within institutions;
- ▶ anticipatory in being applied at the point of design of legislation, policies and programmes when it is still possible to alter the thrust and content of the policy or programme if this is found to be necessary;
- ▶ participative in including the representative organisations of those who experience inequality in the legislative development, policy-making and decision-making processes. This participation is a key element of equality mainstreaming in ensuring that the organisations of those experiencing inequality are enabled to bring forward their perspectives, analysis and knowledge within equality mainstreaming. It is important that supports are available to organisations to ensure they have the capacity and the resources to participate effectively;
- ▶ monitored through measuring and reporting on tangible outcomes from the equality mainstreaming process so that the equality and business benefits are seen and shared by all.

## Implementing Equality Mainstreaming

Equality mainstreaming at an institutional level is a pre-requisite to equality mainstreaming of policies and programmes by an institution. Equality mainstreaming at an institutional level involves incorporating a focus on equality in the internal policies, procedures and practices of that institution that relate to employment, planning and policy making, and service provision. Equality mainstreaming at an institutional level is about ensuring the equality competence of that institution.

Equality competence requires the institution:

- ▶ to be planned and systematic in its approach to equality by putting in place
  - equality policies that set out commitments to equality,
  - equality and diversity training for all staff to develop the skills and knowledge to implement these equality policies,
  - an equality action plan that sets out what the institution is seeking to achieve in terms of equality on the age, disability, gender, race, religion and sexual orientation grounds.
- ▶ to insert a focus on equality in governance of the institution by ensuring decision making is
  - evidence based through data collection, pursued with the requisite sensitivities highlighted above, on the grounds of age, disability, gender, race, religion and sexual orientation,
  - participative in involving the organisations of those who experience inequality,
  - assessed for its impact on groups that experience inequality.

Equality mainstreaming of legislation, policies and programmes would therefore be integral to the practice and ethos of equality competent institutions. The following key elements can be identified in effective equality mainstreaming of policies and programmes:

- ▶ Gathering and analysing data on the groups that experience inequality that has relevance for the policy or programme under consideration. This data should cover all six grounds of age, disability, gender, race, religion and sexual orientation, and should include a focus on multiple discrimination and where these grounds interact. This data gathering should be approached in a manner that respects particular sensitivities in relation to data collection on some of the groups and that reflects different cultures in relation to data collection across the Member States.
- ▶ Assessing the likely impact of the legislation, policy or programme on those experiencing inequality across the grounds of age, disability, gender, race, religion and sexual orientation.

Impact is assessed through exploring the capacity of the legislation, policy or programme to take account of the practical implications of diversity and to be relevant and of benefit to the group experiencing inequality. Diversity is defined as encompassing:

- the identity of the group, its values, its manner of communication and its perspective on society,

- the experience of the group, the nature of its relationship with the wider society,
  - the situation of the group, its economic, educational, health and accommodation status.
- ▶ Participation by the organisations of groups that experience inequality in the process of equality mainstreaming. This participation is necessary in examining the quality of the data gathered and of the impact assessment made, and in identifying any change required to the legislation, policy or programme as a result of this process.
  - ▶ Monitoring of institutional practice and of the implementation of legislation, policies and programmes to assess their impact on equality on the grounds of age, disability, gender, race, religion and sexual orientation.

## Barriers to Equality Mainstreaming

Equality mainstreaming is a new process. It has been developed unevenly across the Member States. This uneven development varies from positive duties in equality legislation on public authorities to have due regard to equality in carrying out their functions, to voluntary initiatives in equality mainstreaming supported by specialised equality bodies, to the absence of any form of equality mainstreaming.

This experience highlights some of the barriers to the even and successful development of equality mainstreaming. These include:

- ▶ a lack of political will and leadership and a shared ambition for equality,
- ▶ a lack of administrative capacity to implement equality mainstreaming in public sector organisations,
- ▶ the absence of human and financial resources to implement equality mainstreaming,
- ▶ the absence of any legal basis in equality legislation to require equality mainstreaming and the limited coverage of equality legislation where it is restricted to the employment field,
- ▶ the lack of resource materials or effective training available to those implementing equality mainstreaming,
- ▶ lack of understanding of the benefits and business case for equality mainstreaming,
- ▶ limitations in the resources and capacity of non-governmental organisations to engage with the equality mainstreaming process,
- ▶ the absence of a comprehensive approach to equality mainstreaming that embraces all grounds covered by equality legislation – age, disability, gender, race, religion and sexual orientation grounds.

It is important that any strategy to implement equality mainstreaming is capable of addressing these barriers at EU level and at Member State levels.

## Specialised Equality Bodies and Equality Mainstreaming

Specialised equality bodies have played valuable roles in relation to equality mainstreaming in a number of the Member States as part of their mandate to combat discrimination and promote equality.

These roles include:

- ▶ providing a leadership for and promoting the practice of equality mainstreaming at institutional level and in developing legislation, policy making and programme development, and demonstrating and disseminating the benefits of equality mainstreaming;
- ▶ developing resource materials for and providing advice to institutions to become equality competent, and sharing good practice among institutions which implement equality mainstreaming;
- ▶ networking the representative organisations of groups experiencing inequality and supporting their involvement in equality mainstreaming;
- ▶ generating data and promoting the collection of data necessary for equality mainstreaming taking account of the requisite sensitivities highlighted above;
- ▶ establishing and monitoring standards for equality mainstreaming;
- ▶ reporting on progress with equality mainstreaming and on areas for improving equality mainstreaming to the national governments and to the European Commission.

## European Commission and Equality Mainstreaming

The European Commission has valuably accorded a policy priority to equality mainstreaming in “Non Discrimination and Equal Opportunities for All – A Framework Strategy”. The European Year of Equal Opportunities for All provides a valuable launching pad from which to develop and implement a strategy for equality mainstreaming. The first annual high level equality summit could usefully launch this process.

The strategy for equality mainstreaming should have dual focus:

- ▶ equality mainstreaming EU institutions and in EU legislative development, policy making and programme development;
- ▶ stimulate and support equality mainstreaming at Member State level.

*In terms of equality mainstreaming at EU level the European Commission should:*

- 1 establish current good practice in equality mainstreaming within the EU and in other jurisdictions and develop a standard for the process of equality mainstreaming;
- 2 provide training to and develop resource materials for officials with responsibility for legislative development, policy making and

- programme development to implement this standard for equality mainstreaming at EU level;
- 3 establish an institutional infrastructure to monitor the application of this standard and to provide technical assistance where necessary;
  - 4 develop procedures to involve the representative organisations of groups experiencing inequality in the process of equality mainstreaming at EU level;
  - 5 create an advisory structure involving Member States and specialised equality bodies to support the development and implementation of a strategy for equality mainstreaming;
  - 6 develop and implement a programme of equality competence development for all EU institutions.

*In terms of stimulating and supporting equality mainstreaming at Member State level the European Commission should:*

- 1 build a process of dialogue and debate to share perspectives on and good practice in equality mainstreaming across the Member States;
- 2 prepare and issue a communication on equality mainstreaming;
- 3 develop resource materials to stimulate and support equality mainstreaming at Member State level based on good practice developed at EU level and across Member States which are implementing equality mainstreaming initiatives;
- 4 support capacity development for equality mainstreaming at Member State level through the Structural Funds and through the PROGRESS fund;
- 5 introduce requirements in relation to equality mainstreaming through the Structural Fund regulations, guidelines for the Open Method of Coordination on Social Protection, Health and Pensions, and Guidelines on the preparation of National Reform Programmes;
- 6 establish a legal basis for, and requirements in relation to, equality mainstreaming through the Equal Treatment Directives.

The First EU Annual  
High Level Equality Summit  
February 2006

## Introduction

Equinet is the European network of specialised equality bodies. Equinet partners are defined by their status as independent specialised equality bodies with a legal basis and a mandate to assist those who experience discrimination, to give independent advice and to conduct independent investigations.

Equinet's overarching mission is to enhance the contribution of the specialised equality bodies to the promotion of equality and the combat against discrimination. It seeks to realise this mission through:

- ▶ exploring and developing the equality concepts used in European and National level anti-discrimination legislation.
- ▶ supporting the development of effective enforcement strategies and practices by specialised equality bodies.
- ▶ expressing views and communicating opinions at a European level on issues relating to promoting equality and combating discrimination based on the experience of specialised equality bodies.
- ▶ stimulating and facilitating capacity building of people involved in specialised equality bodies.
- ▶ developing and maintaining a resource of relevant information.
- ▶ creating opportunities for persons involved in equality bodies to network.

The European Commission framework strategy on 'Non-Discrimination and Equal Opportunities for All' includes a commitment by the Commission to organise an annual high level "Equality Summit". This summit would involve Ministers, heads of national Equality Bodies, Presidents of European level NGOs, the European social partners and representatives of international organisations. This summit is to take place for the first time in early 2007 to coincide with the launch of the European Year of Equal Opportunities for All.

This Equinet Opinion seeks to communicate a view from the specialised equality bodies on the organisation of and focus for this equality summit.

## An Equality Summit

The proposal of the Commission to organise an annual high level equality summit is welcome. It provides an opportunity to:

- ▶ achieve a high level policy focus on issues of equality and discrimination.
- ▶ build a consensus on strategies and priorities in seeking to combat discrimination and promote equality.
- ▶ support the full and effective implementation of the EU framework strategy on Non Discrimination and Equal Opportunities for all.
- ▶ stimulate new initiatives at Member State level to promote equality and combat discrimination.

The proposed participation of the specialised equality bodies in the summit is valuable. These bodies can bring a unique and necessary perspective to bear on the deliberations of the summit given their particular mandate, expertise and experience within the Member States. It is important therefore that the specialised equality bodies should be actively involved in defining the programme for the summit, in setting out perspectives within the deliberations of the summit and in supporting the follow up to actions agreed at the summit.

## Summit Objectives for 2007

The EU framework strategy on Non-Discrimination and Equal Opportunities for all provides the key context for the annual equality summit. The central objective for the summit should therefore be to support and progress a full and effective implementation of the framework strategy.

In this the summit should seek to:

- ▶ engage all of the participants in shaping the priorities identified in the strategy, in supporting the implementation of initiatives identified in the strategy and in keeping the strategy under review so that it can be further developed as necessary.
- ▶ build a dialogue on priority elements within the strategy and how they can most effectively be implemented at EU and Member State levels.
- ▶ stimulate action and initiative to be taken on foot of the deliberations of the summit over the period up to the next annual summit.

## Summit Focus for 2007

The summit needs to be strategic and topical. To be strategic involves taking a long term perspective and focussing on a contribution to the development of interventions that need to be implemented over this longer-term perspective. To be topical involves taking a more immediate perspective and focussing on a contribution to current initiatives.

*Equality mainstreaming should provide the strategic focus for the summit:*

The framework strategy identifies that it is difficult for legislation alone to tackle the complex and deep-rooted patterns of inequality experienced by some groups. The strategy breaks important new ground with a commitment to develop tools to promote mainstreaming of non-discrimination and equal opportunities for all in relevant EU policies.

It is not suggested that the summit would be limited to the agenda for the EU Year of Equal Opportunities for All. The summit is a separate and distinct process which is being initiated as part of the EU Year of Equal Opportunities for All. As such it should pursue its own agenda. However the focus on equality mainstreaming can draw on and reflect the four main priority objectives for the year. Equality mainstreaming:

- ▶ contributes to *rights* in that it should ensure policies and programmes do not discriminate, take diversity into account and proactively promote equality,

- ▶ is central to *recognition* in ensuring the design and development of policies and programmes take account of the practical implications of diversity,
- ▶ requires *representation* in that equality mainstreaming should involve the participation of organisations representing the interests of those who experience inequality,
- ▶ builds *respect* in that equality mainstreaming reflects a valuing of diversity and ensures policies and programmes contribute to respect for different groups and communities.

Given the importance of this commitment and given the complexity in achieving its effective implementation, the deliberations of the equality summit could make a valuable contribution to initiation and implementation of equality mainstreaming. The main strand of debate at the summit would therefore explore:

- ▶ experience at Member State level of equality mainstreaming that incorporates all the grounds covered by Article 13;
- ▶ learning for equality mainstreaming from the development, implementation and maintenance of a gender mainstreaming approach at EU level;
- ▶ strategies to develop an equality mainstreaming approach in a small number of key EU policy areas such as the open coordination of social protection and inclusion policies and the integrated guidelines for growth and jobs;
- ▶ actions to ensure equality mainstreaming has access to equality data in the relevant policy fields and is adequately linked to and reinforced by positive action developed in these policy fields;
- ▶ what now needs to be done to initiate equality mainstreaming approach at EU level and at Member State level.

*Equality legislation should provide the topical focus for the summit:*

The framework strategy highlights issues in relation to the transposition of the EU Directives and the effective implementation of legal protection against discrimination. The strategy raises needs in relation to further developing the current legal framework and commits to a study into the relevance and feasibility of possible new measures to complement the current legal framework.

The focus on the equality legislation would also reflect useful linkage with the objectives for the EU year. Legislation is central to any focus on *rights*. It further stimulates *respect* for difference and *recognition* for the practical implications of difference.

Given the foundational nature of this legislation to the promotion of equality and the combat against discrimination and given the current debate on the adequacy of this legislation and on the challenge to effectively implement it, the deliberations of the equality summit could make a valuable contribution to building a consensus around what further steps need to be taken in this area. This strand of debate at the summit would therefore explore:

- ▶ progress made on the feasibility study and outcomes from this.

- ▶ the role and needs of specialised equality bodies in the effective implementation of the legislation.
- ▶ lessons from the implementation of the current legislation for the further development of this legislation and the legal concepts that underpin it.

Finally in terms of a focus for the summit it is important to recognise that it will coincide with the launch of the European Year of Equal Opportunities for All. This does not mean the summit should merely replicate the themes of the year. The focus for the summit must be the wider EU framework strategy. However the summit should have a particular contribution to make in supporting the success of the year and in ensuring a long term legacy from the year. A further strand of debate at the summit would therefore explore:-

- ▶ the nature of the long term legacy that should be achieved from the year at Member State level and at EU level.

## Summit Structure for 2007

The equality summit should seek to be:

- ▶ participatory, in hearing the voices of the different interests present.

Formal inputs to the summit should be strategic and should be designed to stimulate dialogue between the different types of organisations represented, between the EU and the Member States, between the statutory sector and the NGO sector. The NGO sector has a particular contribution to make in bringing forward and articulating the perspective and interests of those groups that experience inequality on the basis of their gender, disability, race, religion, sexual orientation or age.

The dialogue should be a key space within which the voices of the different interests present are heard rather than seeking to structure all contributions through formal inputs.

The dialogue should be guided so that conclusions are reached that enjoy a level of consensus.

- ▶ decisive, in defining action and initiative to be pursued on foot of the summit.

A concluding session to the summit should draw together summit conclusions in terms of:

- practical initiatives that will be prioritised at EU and Member State level to promote equality and combat discrimination,
- themes for ongoing dialogue between the EU and different participants such as the specialised equality bodies or the Ministers from the Member States or within the social dialogue or the civil dialogue at EU level.

- ▶ ambitious, in building and supporting a leadership for equality at EU and Member State level.
- The high level nature of the summit is an important element that must be realised and built on. It should include a high level presence from the Commission in terms of key personnel from the broad range of policy areas that should be a focus for equality mainstreaming.
- A leadership for equality should be established as an agreed outcome from the summit. Networking, information provision, consensus building and negotiation should be designed to stimulate and support this leadership. Follow up actions should be identified and pursued in this regard.

## Conclusion

Equinet welcomes this opportunity to provide an opinion on the forthcoming inaugural equality summit. The summit holds significant potential for the further promotion of equality and combating of discrimination across the EU.

Equinet hopes that this opinion can serve as a basis for an ongoing dialogue with the Commission on the summit, the preparation for the summit and the follow up activities from the summit. We look forward to a successful summit and are ready to make the contribution necessary for such success.

Evaluation of the Open Method of  
Coordination in order to prepare for  
Streamlining in the Field of  
Social Protection  
June 2005

## Introduction

Equinet welcomes this opportunity to provide an opinion to the European Commission on the evaluation currently being carried out of the Open Method of Coordination in the field of pensions and social inclusion. It is hoped that this opinion will inform and contribute to decision making on the establishment of a full streamlined process in this area on the basis of a consistent set of common objectives.

Equinet is the European Network of Specialised Equality Bodies. It brings together specialised equality bodies from Austria, Belgium, Cyprus, Denmark, Estonia, France, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden and United Kingdom. Specialised equality bodies are statutory institutions established in the Member States to ensure the effective implementation of equality and anti-discrimination legislation.

Equinet operates to:

- 1 Contribute to the effective implementation by specialised equality bodies of their mandate through exchanging information and expertise on enforcement strategies.
- 2 Build an expertise on the dynamic interpretation of equal treatment legislation across the European Union.
- 3 Support the emergence of a dialogue between the institutions of the European Union and the specialised equality bodies with a view to contributing to the inclusion of an effective equality focus in European Union policies and programmes.

The specialised equality bodies have mandates that include a focus on all grounds covered by the European Union equal treatment Directives - gender, age, disability, race, religion and sexual orientation. The specialised equality bodies play a range of different functions in the implementation of equality and anti-discrimination legislation. These include the provision of information on the legislation, legal assistance to individuals making a claim of discrimination under the legislation, conducting inquiries and investigations on issues of inequality and discrimination, conducting research on these issues, supporting the development and application of good equality practice and playing roles in the implementation of statutory duties on organisations to proactively promote equality. The specialised equality bodies are concerned with the combating of discrimination and the promotion of equality in the workplace and in the provision of goods and services. These broad mandates place the specialised equality bodies in a unique and valuable position to make a contribution to policy formation.

## Equality

This opinion aims to support an enhanced focus on equality in the Open Method of Coordination in the fields of pensions and social inclusion. This focus on equality needs to encompass all six grounds covered in the EU equal treatment Directives. The Open Method of Coordination needs to have a particular focus on enhancing the situation, improving the experience and affirming the identity of women, Black and

minority ethnic people, people of different religions, older people and young people, gay, lesbian and bisexual people, transsexual people and people with disabilities.

The goal of equality needs to be clearly established in the common objectives of the Open Method of Coordination in the fields of pensions and social inclusion. The Open Method of Coordination should ensure that policies, programmes and practice at Member State level in these fields are characterised by:

- ▶ non discrimination with action taken to prevent discrimination and the emergence of inequalities,
- ▶ a valuing of difference and diversity with action taken to make adjustments for the different identities, experiences and situations of groups currently experiencing inequality and discrimination,
- ▶ equality with action taken, including positive action allowed under equality legislation, to achieve change in the inequalities being experienced by these groups.

The goal of equality requires that the Open Method of Coordination should both involve and promote a dual strategy of mainstreaming and targeting. General policies and programmes in the field of pensions and social inclusion need to have a capacity to include and benefit groups experiencing inequality. Specific policies and programmes are also required that target groups experiencing inequality and that achieve change in this inequality.

In pursuing the goal of equality the Open Method of Coordination should contribute to a new access to:

- ▶ *resources* including employment, income, education, health and accommodation,
- ▶ *decision making* including participation in the development and implementation of policy and programmes in the fields of pensions and social inclusion,
- ▶ *status and standing for diversity* such that negative stereotypes and false assumptions do not inform the design and delivery of policies and programmes and such that policies and programmes take account of the practical implications of this diversity,
- ▶ *relationships of trust, respect and solidarity* in the interaction between policy makers and programme implementers and members of groups that experience inequality.

## The Open Method of Coordination

The Open Method of Coordination in the fields of pensions and social inclusion already has a track record in contributing to the goal of equality. This contribution has been made through the process of the Open Method of Coordination itself and through the specific guidelines and working methods applied in the field of pensions and social inclusion.

The process of the Open Method of Coordination has been important in:

- ▶ achieving a priority focus from policy makers at Member State level on the issues of pensions and of social inclusion.
- ▶ promoting a democratisation of the process of planning, policy making and programme development by encouraging participation by all relevant actors including non-governmental organisations.
- ▶ stimulating a better coordination and cooperation between the different agencies at Member State level with roles of relevance to the fields of pensions and social inclusion.
- ▶ contributing to new thinking in relation to policy making and programme development at Member State level through processes of peer review and preparation of joint reports that allow for mutual learning out of the different approaches developed by the Member States.
- ▶ enhancing a capacity to define and measure progress in the fields of pensions and of social inclusion through the development and application of indicators in each of these fields.

The field of pensions has an important contribution to make to equality in terms of the financial security of older people. Older people are a diverse group including men and women, Black and minority ethnic people, gay, lesbian and bisexual people, transsexual people, people of different religions, and people with disabilities. Each of these subgroups poses particular challenges in terms of their different situations, experiences and identities. An effective pension policy therefore needs a broad equality focus if it is to achieve financial security for all older people.

The current guidelines for the Open Method of Coordination in the field of pensions do include an important focus on equality. They emphasise the importance of adequacy of pensions so that older people are not placed at risk of poverty. They seek to ensure that the principle of equal treatment between women and men is respected in the modernisation of pensions systems. The working methods set out refer to the need to consult relevant actors.

The field of social inclusion has an important contribution to make to equality. Discrimination diminishes access to the labour market and to goods and services. It contributes to inequality, poverty and exclusion. A failure to accommodate and take account of diversity of groups experiencing inequality limits the capacity of policies and programmes to achieve benefit for these groups and contributes to inequality, poverty and exclusion. Groups such as women, older people, minority ethnic groups and people with disabilities have all been identified as being at particular risk of poverty. Other groups at risk of poverty are diverse and include men and women, older people, young people, Black and minority ethnic people, transsexual people, gay, lesbian and bisexual people, people with disabilities and people with different religions. An effective social inclusion policy therefore needs a broad equality focus if it is to effectively address the situation of all who experience social exclusion.

The current guidelines for the Open Method of Coordination in the field of social inclusion do include an important focus on equality. They make specific reference to men and women, people with disabilities and immigrants. They focus on a broad range of policy areas where inequality and discrimination are issues including employment, housing, healthcare and education. The working methods require a

gender mainstreaming in all actions aimed at achieving the objectives by taking into account the gender perspective in the identification of challenges, the design, implementation and assessment of policies and measures, the selection of indicators and targets and the involvement of stakeholders. Reference is also made to the mobilisation of all actors including dialogue with non-governmental organisations.

It would be important that a new streamlined process and common objectives in the fields of pensions and social inclusion would maintain the focus on equality in the current guidelines. It will also be important to further develop this equality focus in a new streamlined process.

This further development should reflect:

- ▶ a multi-ground approach to equality embracing equally the grounds of gender, age, disability, race, religion and sexual orientation.
- ▶ a dual strategy of mainstreaming a focus on these grounds in general provisions and of including provisions specific to these grounds in the open method of coordination.
- ▶ an ambitious range of equality objectives with a capacity to achieve a new access to resources, decision making, status and standing for diversity, and relationships of trust, respect and solidarity for groups within these grounds that are experiencing inequality.

This will require a further development in current working methods and objectives within a streamlined open method of coordination. While there will be a focus on indicators and data gathering as part of this development it will be important to respect particular sensitivities in relation to data collection on some of the groups and to reflect different cultures in relation to data collection across the Member States.

## Working Methods

The streamlined process for an Open Method of Coordination in the fields of pensions and social inclusion should require the following working methods:

- ▶ Plans prepared at Member State level should have to be equality mainstreamed. Equality mainstreaming should be required in relation to all actions aimed at achieving common objectives established for the process. Equality mainstreaming should take account of the perspective of groups experiencing inequality under the grounds of gender, race, age, sexual orientation, religion and disability in the identification of challenges, the design, implementation and assessment of policies and measures, the selection of indicators and targets and the involvement of stakeholders.
- ▶ A programme of action should be developed by the European Commission to support equality mainstreaming at Member State level. This should include the development of methodologies for equality mainstreaming, the building of capacity among officials at Member State level to conduct equality mainstreaming and establishing standards for equality mainstreaming.
- ▶ Indicators for the common objectives should where possible and appropriate be disaggregated across the grounds of gender, disability, religion, age, race and sexual orientation. An equality specific indicator

should be developed in the field of pensions and of social inclusion. Data gathering and analysis should be required in relation to groups experiencing inequality where appropriate and possible. Qualitative data should be gathered where quantitative data is not available or appropriate.

- ▶ The peer review process for the Open Method of Coordination should include a focus on equality mainstreaming methodologies and on the practices of promoting equality in the fields of pension and social inclusion.
- ▶ The joint report on the Open Method of Coordination should include an analysis of impact on equality for groups experiencing inequality across the grounds of gender, sexual orientation, age, disability, religion and race.
- ▶ The preparation of action plans at Member State level should be required to include opportunities for participation by specialised equality bodies and by non-governmental organisations articulating the interests of groups experiencing inequality.

## Common Objectives

Equality mainstreaming should ensure that all objectives established for the streamlined process of the Open Method of Coordination are framed and pursued in a manner that promotes equality on the grounds of gender, age, disability, race, religion and sexual orientation. The common objectives should focus Member State policies and measures on:

- ▶ adequacy of pensions for groups currently experiencing inequality.
- ▶ adequacy of income for groups currently experiencing inequality.
- ▶ full equality in practice in employment and labour market provisions.
- ▶ access to, participation in, and outcomes from education provision, health services and
- ▶ accommodation provisions for groups experiencing inequality.

A specific equality objective should be established as one of the common objectives for the streamlined process. This should focus on the development of Member State policies and measures to:

- ▶ achieve economic independence and financial security for women, people with disabilities, older people and Black and minority ethnic people.
- ▶ eradicate inequalities on the grounds of gender, age, disability, race, religion and sexual orientation in measured poverty.
- ▶ support and strengthen an infrastructure to promote equality and combat discrimination including legislation, specialised equality bodies, equality mainstreaming and measures targeted on groups experiencing inequalities.

## Conclusion

Equinet looks forward to a positive response to this opinion. Should further information on or a further development of the ideas in this opinion be required Equinet would be available and willing to respond to any request from the Commission