Addressing poverty and discrimination: two sides of the one coin
### Equinet member organisations

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### Addressing poverty and discrimination: two sides of the one coin

An Equinet Opinion

December 2010


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Introduction

2010 has been declared the European Year for Combating Poverty and Social Exclusion. This Year provided an important moment to acknowledge the 85 million women and men who live below the poverty threshold in the European Union and to re-ignite the commitment to eliminating this poverty. The Year has also valuably served to highlight the links between discrimination and poverty.

In his closing address to the Fourth Equality Summit in Brussels on the 16th November 2010 European Commissioner for Employment, Social Affairs and Inclusion László Andor emphasised this link between discrimination and poverty. He called for further developments to be progressed in three different areas. The third area he focused on was that of ‘the wider fight against discrimination must go hand in hand with poverty related initiatives at the European level’.

Equinet has participated in, and contributed to, the activities of the Year at a European level. It has also encouraged equality bodies to engage with activities related to the Year at a Member State level. This involvement is based on the experience and work of equality bodies which has contributed to an understanding that:

- Discrimination is one cause of poverty and social exclusion.
- Poverty and social exclusion increase the risk of experiencing discrimination.
- Poverty and social exclusion contribute to the under-reporting of discrimination.

It is this understanding that has encouraged Equinet to prepare this opinion on ‘Addressing Poverty and Discrimination: Two Sides of the One Coin’. This opinion seeks to draw on the experience and work of the equality bodies to:

- Deepen the understanding of the link between poverty and discrimination.
- Encourage and support a policy focus on the link between poverty and discrimination.
- Further develop a practice focus on the link between poverty and discrimination in the work of equality bodies.

This opinion was prepared on the basis of a survey of Equinet members with a mandate that includes the ground of socio-economic status. Inputs were received from the members of the Equinet working group on policy formation on how their respective organisations addressed the poverty issue. A further short survey was conducted of all Equinet members to identify good practices in addressing the issue of poverty.

European Union context

The Lisbon Treaty entered into effect in December 2009. It offers a valuable foundation for an enhanced response to the link between poverty and discrimination.

Article 6 of the Treaty on the European Union recognises the rights, freedoms and principles set out in the Charter of Fundamental Rights of the European Union and secures that it has the same legal value as the Treaties. The Treaty states that the Charter does not establish any new power or tasks for the European Union.

Article 21 of the Charter represents a very progressive understanding of discrimination, covering a considerably wider field and scope than that in the European Treaties. It stipulates that ‘any discrimination based on any ground such as sex, race, colour, ethnic or social origin, genetic...
features, language, religion or belief, political or any other opinion, membership of a national minority, property, birth, disability, age or sexual orientation shall be prohibited. This open ended understanding of discrimination and the naming of the ground of social origin reflects an understanding of discrimination that usefully links poverty and discrimination.

Article 10 of the Treaty on the Functioning of the European Union introduces in effect a requirement of equality/non-discrimination mainstreaming by stipulating that ‘in defining and implementing its policies and activities, the Union shall aim to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation’. This means that, among other policies, the social inclusion policies of the European Union should be assessed at design stage for their impact on equality and non-discrimination.

Article 9 of the Treaty on the Functioning of the European Union introduces in effect a requirement of social inclusion mainstreaming by stipulating that ‘in defining and implementing its policies and activities, the Union shall take into account requirements linked to the promotion of a high level of employment, the guarantee of adequate social protection, the fight against social exclusion, and a high level of education, training and protection of human health’. This means that, among other policies, policies on equality and non-discrimination of the European Union should be assessed at design stage for their impact on social exclusion.

These two different mainstreaming requirements will thus have the effect of further developing policy responses to the link between discrimination and poverty. It will be important that the two mainstreaming processes themselves are designed in a manner where the two processes are coherent with each other and this will further enhance the focus on the poverty/discrimination link.

The ‘Europe 2020: a strategy for smart, sustainable and inclusive growth’ strategy adopted by the European Council in June 2010 also offers a valuable foundation for an enhanced response to the link between poverty and discrimination.

Member States will have to prepare National Reform Programmes under this strategy. The integrated guidelines for drawing up these programmes include a guideline ‘Promoting social inclusion and combating poverty’. This guideline emphasises that ‘Member States’ efforts to reduce poverty should be aimed at promoting full participation in society and economy’ and that ‘Member States should put in place effective anti-discrimination measures’.

European Commissioner Andor underscored the link between poverty and discrimination suggested in this guideline in his address to the fourth Equality Summit. He stated that ‘National Reform Programmes need to include an integrated approach that brings together actions on equality and against poverty’.

The Council of the European Union in December 2010 adopted a declaration on the European Year for Combating Poverty and Social Exclusion: ‘Working together to fight poverty in 2010 and beyond’. This declaration also acknowledges that ‘poverty is a multidimensional issue and fighting it will require the mobilisation of all relevant policies, tools and levels of government’ and goes on to emphasise that ‘a broad approach to poverty is crucial to safeguard the rights of future generations and to achieve our common vision: a fair, participative and inclusive society – in which everybody has a place and where poverty will no longer exist’.

In the context of the Europe 2020 strategy, the European Commission adopted, in December 2010, a communication on ‘The European Platform against Poverty and Social Exclusion: A European framework for social and territorial cohesion’. Specific attention is dedicated to social inclusion and combating poverty as part of a chapter about delivering action to fight poverty and social exclusion across the policy spectrum (Chapter 3.1, subsection Social inclusion and anti-discrimination). It points out that ‘Social inclusion policies need to dovetail with effective anti-discrimination policies, as for many groups and individuals the roots of poverty and hardship very often lie in restrictions from opportunities and rights that are available to other groups [...] Closer integration between social and anti-discrimination policies is crucial to address the specific disadvantages affecting large segments of the European population’. In particular, the Commission communication mentions the discrimination experienced by women, people with disabilities, people with mental health problems and certain ethnic groups such as Roma as a main factor increasing the risk of poverty and material deprivation.

### Rationale

**Poverty and discrimination** are closely linked types of injustice. They reflect different aspects of inequality — inequality of resources and inequality of recognition. However they both create barriers to participation in society and in the economy.

Poverty is fundamentally an economic phenomenon. It stops people from participating in society and the economy by limiting the economic resources that they have at their disposal. It is based on inequality in the distribution of these resources in society.

Discrimination is, in part, a cultural phenomenon. It stops people from participating in society and the economy by excluding them on the basis of their membership of a particular societal group. It is based on inequality in access to status and standing for, and recognition of, different identity based groups in society.

Many groups experience both forms of inequality at the same time. Women, for example, are more likely to be at risk of poverty than men. Women continue to experience a significant gender pay gap in relation to men. Most part-time workers are women. Women spend substantially more time on unpaid caring and household work than men. Women thus experience a high level of economic inequality. At the same time women are subjected to being stereotyped as caring, dependent and passive. Domestic violence and sexual harassment are predominantly experienced by women. Allegations of workplace discrimination on the gender ground are almost exclusively made by women. Women thus experience a high level of cultural inequality in being afforded a lesser status and standing as a group than men.

These different forms of inequality are linked. The economic inequality experienced by women contributes to a lesser status and standing for women than that accorded to men. This is due to their disadvantaged economic position. Discrimination and stereotyping in turn contribute to economic inequality for women by excluding them from economically advantageous positions.

The link between these different forms of inequality is also evident in the experience and situation of other groups covered by the equal treatment Directives. Minority ethnic groups, older people or people with disabilities, for example, experience poverty and social exclusion as well as discrimination and low levels of status and standing. The Council declaration on the ‘European Year for Combating Poverty and Social Exclusion: Working together to fight poverty in 2010 and beyond’ usefully emphasises the link between the different forms of inequality in the experience of minority ethnic people, among others, in stating that ‘particular attention should be given to vulnerable groups such as migrants, the Roma and other ethnic minorities and to extreme forms of poverty such as homelessness’.

Despite this link, the policy responses to poverty and to discrimination continue to be fragmented and characterised by different strategies and approaches. This diminishes the effectiveness of both anti-poverty and anti-discrimination strategies. A more integrated approach would better reflect people’s real experience of inequality and would hold greater potential to eliminate inequality.
Equity bodies experience the negative consequences of this fragmentation in their work:

- There are issues of discrimination that they are unable to respond to when these are based on the ground of socio-economic status unless the equality legislation covers this ground.
- There are barriers of poverty that prevent people from the grounds covered by the equal treatment legislation from coming forward and availing of the services of the equality body.
- There are others who discrimination and inequality that they cannot raise or tackle given that they lie in socio-economic structures that can lie outside of their mandate.

However there are a number of Member States where the equality bodies operate under equal treatment legislation that does include a socio-economic status ground or is based on an open ended listing of grounds. The experience of these equality bodies offers a valuable starting point of practical experience from which to explore the link between poverty and discrimination and its practical implications for the work of equilibrium bodies.

The Equinet survey

Equinet conducted a survey in February 2010 targeting those equality bodies that have an explicit legal mandate to promote equality and combat discrimination based on socio-economic status. Nine equality bodies in Belgium, Bulgaria, Croatia, Czech Republic, Hungary, Latvia, Lithuania, Romania and Slovakia have such a mandate. All nine responded to the questionnaire detailing their experiences in relation to their work on this ground.

These equality bodies represent a wide diversity in geographical terms as well as in terms of mandate, tasks and powers. It is, therefore, important to note that the survey can provide a qualitative rather than a quantitative picture.

It is of interest to note that eight of the nine equality bodies are established in a European Union candidate country or a European Union Member State that accessed the European Union in 2004 or 2007. Any explanation of this would necessitate further research but it is remarkable that the legislators of the older Member States, with only one exception, have failed to incorporate this socio-economic status ground in their equal treatment legislation.

The survey explored the following areas:

- The added value of the socio-economic status ground in the equal treatment law.
- The number and type of claims received with socio-economic status as a ground.
- Cooperation between equality bodies and other relevant stakeholders on this issue.
- Activities to support good practice and raise awareness of rights in relation to this ground.
- Barriers to working on the socio-economic status ground.
- Intersections between socio-economic status ground and other grounds.

The survey used ‘socio-economic status’ as a general category covering the different terms used in the Member State equal treatment legislation for this ground. The actual terms used in national laws are numerous. They include for example: ‘fortune’, ‘social descent’, ‘personal and social status’, ‘property status’, ‘financial status’, and ‘social origin’. However, these terms are very similar in protecting those with a specific (disadvantaged) socio-economic status from discrimination.

The answers to the survey suggested that the added value of a socio-economic status ground is not always clear even to the equality bodies themselves. This is not to say that those who gave this answer do not see the need for such a ground, rather it reveals that they have not yet found the best way to operationalise this ground. Therefore, further experience of working on this ground and an open exchange of these experiences is needed to identify the added value of the socio-economic status ground in combating discrimination and poverty.

Some equality bodies mentioned that there is a symbolic importance in codifying the socio-economic status ground in the equal treatment laws. Other equality bodies stated that they receive numerous complaints where people were discriminated against because of their socio-economic status. These equality bodies noted that this ground gives them the opportunity to tackle discrimination in a more comprehensive way by providing assistance to victims in cases where the act of discrimination is not covered by the European Union Directives.

Almost all the equality bodies noted that discrimination on the socio-economic status ground is often experienced in the context of multiple discrimination, namely in conjunction with other grounds covered by the equal treatment legislation.

Some equality bodies reported no cases on this socio-economic status ground, while others reported up to 95 cases, accounting for a notable 25% of their casework. The large variation in numbers can partly be explained by the fact that these claims frequently concern multiple discrimination and that some of the equality bodies can only address these cases on one protected ground. Therefore in these cases, having initiated proceedings on another ground, the socio-economic status ground does not appear in the statistics of the equality body.

Equality bodies reported casework on the socio-economic status ground as being most prominent in the fields of housing, education and the provision of goods and services (including public services). The number of cases reported in the employment sector is smaller.

Some equality bodies reported that the claims received on the socio-economic status ground often do not concern discrimination but are human rights claims in the broader sense. Therefore the equality body can lack the legal competence to deal with them unless they are embedded in national human rights institutions. Other equality bodies highlighted the poverty issues they come in contact with can be a result of discrimination on grounds other than the socio-economic status ground. For example the experience of discrimination by Roma people is seen by many equality bodies as a major causal factor in the poverty they experience.

All equality bodies surveyed stated that the victim of discrimination on socio-economic status grounds can, as with other grounds, initiate court proceedings as an alternative to the procedure offered by the equality body. Most of the equality bodies also emphasised that victims of discrimination can be represented and assisted by non-governmental organisations before the court. Many equality bodies reported that these non-governmental organisations formed to protect victims of discrimination can also file actio popularis claims/collective actions if no specific victim of the discriminatory action can be identified. Other state bodies, ombudsman institutions and social partner organisations were also identified as capable of assisting victims of discrimination on the socio-economic status ground. Most equality bodies surveyed underlined that they have formal and/or informal agreements and regular consultations with all or at least some of these stakeholders.

The Belgian Centre for Equal Opportunities and Opposition to Racism reported that Belgium has a specialised service dealing with issues of poverty and social exclusion. The ‘Service for the Fight against Poverty, Insecurity and Social Exclusion’ is institutionally part of the equality body but operates independently and separately with its own budget line. The Service gathers, systematises and analyses information about poverty, social exclusion and access to rights. It makes recommendations in relation to poverty and organises regular structural consultations with people living in poverty. It publishes a biennial report on poverty, insecurity and social exclusion to aid political decision making based on the analysis of data and on consultations with people in poverty and relevant non-governmental organisations.
Equality bodies reported several activities implemented to support good practice, build awareness of rights, train relevant target groups and conduct research in relation to the socio-economic status ground.

Most equality bodies mentioned that socio-economic status is a horizontal issue addressed in relation to the other grounds they cover. Poverty is deemed a key aspect of the socially disadvantaged situation of all minorities. The activities pursued by these equality bodies focus on all grounds, not only the ground of socio-economic status, and involve media campaigns, research on rights awareness and on the situation of people living in poverty, consultation and training events including sensitivity training.

It is clear from the survey that poverty is seen as an important barrier to reporting discrimination and that further action is needed in relation to this. This also necessitates a special focus on the socio-economic status ground and the construction of a safe space within equality bodies for people living in poverty by way of outreach activities and further training events targeting this group.

Equality bodies reported some barriers to working on the socio-economic status ground. Some equality bodies emphasised that the meaning, situation and character of the socio-economic status ground is not understood by many people in the society and even within the equality body. This means that open discussion and training on this ground are necessary within the equality body alongside legal training for the equality body staff on legal work on this ground. The equality bodies noted that socio-economic status and poverty result in a weaker position from which to vindicate one’s human rights. Therefore, socio-economic status and poverty themselves can be seen as a barrier to reporting acts of discrimination and enforcing the law.

Most equality bodies reported clear intersections between discrimination on the socio-economic status ground and discrimination on other grounds. Some equality bodies can tackle these multiple discrimination cases with a special procedure and with the legal possibility of higher sanctions. Other equality bodies needed to start the procedure on only one ground. These intersections were most often reported with ethnic origin, disability, health status, age, family status, social status and citizenship. Some equality bodies found that discrimination on the socio-economic status ground is often a consequence of discrimination on other grounds.

Many of the groups identified by the equality bodies as experiencing, or being at risk of, poverty are groups covered by the six grounds of the European Union Equal Treatment Directives. These include women (gender ground), minority ethnic groups including Roma and migrants (racial or ethnic origin ground), people with disabilities (disability ground) and older people and young people (age ground). Other groups identified by the equality bodies, such as homeless people, are diverse in their make-up and include people from across these six grounds.

The challenge to Equality Bodies

The discrimination/poverty link poses a challenge to all equality bodies. The preparation of this opinion has highlighted this area as a challenge that has still to be met in a convincing manner by all equality bodies. Equality bodies with a mandate in relation to the socio-economic status ground need to deepen their work on this ground and all equality bodies need to further develop a focus on the discrimination/poverty link.

Most equality bodies do not have a mandate that includes the ground of socio-economic status. Some of these equality bodies have recommended the inclusion of such a ground in their national equal treatment legislation. This recommendation has been based on the need for a comprehensive approach to equality that encompasses all groups that experience intersection and discrimination. It has also been based on the relevance of the link between discrimination and poverty to the work of the equality body.

All equality bodies are challenged to engage with the ground of socio-economic status and in particular with this link between discrimination and poverty. This is because poverty and the socio-economic status of people within the grounds that they do cover:

- Acts as a barrier to people coming forward with claims of discrimination.
- Exacerbates this experience of discrimination.
- Increases the likelihood of this discrimination happening.
- Forms part of the structural causes of the inequality and discrimination they experience.

There is a particular challenge to equality bodies that are embedded in National Human Rights Institutions. Such bodies have a particular and wider mandate to respond to poverty issues and to the discrimination/poverty link. This mandate offers valuable potential for the development of human rights-based approaches to poverty and to the discrimination/poverty link.

Equinet conducted a short survey of all equality bodies as part of the preparation of this opinion to identify how and to what extent they addressed issues of poverty and socio-economic as an issue within their work on the grounds that they do cover.

The responses to this survey suggest a range of initiatives that equality bodies could take to engage effectively with the challenge posed by the discrimination/poverty link.

1. Make poverty and socio-economic status a visible factor in the work of the equality body.

   Equality bodies could usefully name the factor of poverty and socio-economic status as an issue in their strategic plans. They could monitor how this factor impinges on their work and report on this in their annual reports. They could thus stimulate an ongoing focus on the poverty/discrimination link.

2. Engage in a dialogue with anti-poverty non-governmental organisations.

   There are a broad range of civil society organisations concerned with poverty and exclusion on the basis of socio-economic status in all Member States. These organisations hold information and knowledge on issues of poverty and social exclusion and offer channels of communication with people experiencing poverty and discrimination on the basis of their socio-economic status and on the basis of other grounds.

   Equality bodies could usefully develop a dialogue with these organisations about the link between poverty and discrimination so as to build a shared understanding of this phenomenon and to explore how to address the implications of this link for their work. Partnerships could be developed with these organisations to create effective strategies for overcoming the barriers for people who experience poverty to report discrimination on whatever ground they experience this discrimination on.

3. Develop capacity to encompass poverty issues in their work.

   Staff training within equality bodies could play a valuable role in enabling equality bodies to develop an effective focus on the discrimination/poverty link and its relevance to their work. Staff training could usefully include modules to develop awareness, knowledge and skills in relation to the poverty issue.

4. Build a knowledge base on the link between discrimination and poverty.

   There is a lack of research and survey work on the link between poverty and discrimination and on the impact of this link on issues of under-reporting, inequality and the experience of discrimination itself.
Equality bodies are well placed to develop a body of research and survey work in this area that would contribute to a better understanding of the discrimination/poverty link and of how best to respond to this link. In particular, research and survey work could build knowledge about the needs, experience and situation of groups covered by the equal treatment legislation who experience poverty and could assist in uncovering the barriers that the poverty experienced by these groups poses to their access to justice.

5. Address socio-economic status as a factor in reporting discrimination.
Under-reporting is a significant issue for all equality bodies. Research has suggested that under-reporting is the norm for some grounds of discrimination. Poverty and the socio-economic status of those who experience discrimination is one significant barrier to reporting discrimination on all grounds.

Outreach initiatives by equality bodies could be targeted at individuals and groups who are covered by the equal treatment legislation and who also experience poverty. A process of mutual education could be developed where the equality body shares information on rights under equal treatment legislation and how best to exercise these rights and where the groups share information on the experience of discrimination and poverty and the situations this experience gives rise to. Networking initiatives of equality bodies could include organisations working on poverty issues so as to open channels of ongoing communication with people covered by the equality legislation who are experiencing poverty.

Equality bodies could usefully develop systems for monitoring the socio-economic status of those who report discrimination to them and who take up their services. This would enable the equality body to assess the extent to which they are addressing this barrier of poverty to reporting discrimination.

6. Build and communicate casework where the mandate of the equality body includes a socio-economic status ground.
It is important to develop a body of casework on the socio-economic status ground in order to clarify and make visible the extent and characteristics of this protection. Initial work has begun in some countries but casework in this area is still very limited. Casework on the socio-economic status ground also needs to be highlighted and communicated so that it reaches all vulnerable groups, contributes to combating under-reporting, raises awareness and stimulates further growth and development of this casework.

7. Include a focus on poverty and socio-economic status in work on public policy.
Equality bodies have a function to publish reports and make recommendations on issues of discrimination. Many equality bodies have used this function as a basis to make a contribution to public policy at Member State level. Equality bodies have a very particular contribution to make to this policy formation based on the expertise and experience they have garnered in the implementation of equal treatment legislation.

Equality bodies could usefully direct their public policy work on areas of policy concerned with the elimination of poverty. People who experience poverty are diverse and are members of all grounds covered by equal treatment legislation. Equality bodies can enable policy makers to address this diversity in anti-poverty policy and programmes.

8. Engage with the preparation of the Member State National Reform Programme under the Europe 2020 strategy.
The employment guidelines for the National Reform Programmes require a particular focus on promoting social inclusion and combating poverty. Under this guideline Member States are encouraged to develop effective anti-discrimination measures.

Equality bodies are well placed to make a positive and effective contribution to enabling Member States respond to this guidance in a manner that addresses the barriers presented by discrimination and by the poverty/discrimination link to participation in employment. This contribution can only be made on the basis of pro-active initiative by equality bodies to build their expertise in this field, to explore the learning from their work for this field and to engage effectively with the national process for preparing the National Reform Programme.

Conclusion
The current social and economic situation across the European Union is of concern. Poverty and inequality are deepening in a context of economic and financial downturn. The focus on the intersection of poverty and discrimination is therefore timely and relevant. The challenge to equality bodies to address this issue in their work has never been more important. However it is a challenge that equality bodies need to be supported and enabled to engage effectively in.

The European Commission can contribute to enabling this focus on the poverty/discrimination link. The roll out and implementation of the Europe 2020 strategy offers significant potential in this regard with its focus on inclusive growth and the link already made between social inclusion, poverty and anti-discrimination measures in the employment guidelines for the National Reform Programmes.

It will be important that any monitoring and peer support in relation to the National Reform Programmes further emphasise this focus on social inclusion and the poverty/discrimination link. This will enable new learning to be garnered on this issue, new strategies to emerge in responding to this link and a supportive context for equality bodies to make their contribution in this regard.

The forthcoming Platform against Poverty of the European Commission also offers opportunities to further develop responses to the link between poverty and discrimination. Equality bodies should be actively involved in the implementation and operation of this Platform against Poverty. Action taken under the Platform against Poverty should include a particular focus on initiatives to respond to the link between poverty and discrimination.

Legislation at European Union level will continue to be an important factor in enabling equality bodies to address the discrimination/poverty link. European Union directives could usefully...
include provisions to enable equality bodies to address cases of multiple discrimination. As equality bodies report that complaints where the socio-economic status of the victim is at stake are most prominent in the field of housing, education and the provision of goods and services, the proposed horizontal directive covering issues beyond the labour market will make a further and vital contribution once enacted. Consideration needs to be given to the inclusion of a socio-economic status ground in future legislation.

Equinet will continue to examine and develop this focus on the link between discrimination and poverty. It will provide a forum for debate and exchange of experiences between equality bodies in relation to their work on this issue. It will stimulate and enable better links between equality bodies and non-governmental organisations addressing poverty issues. It will seek to support the policy debate at European level on addressing the discrimination/poverty link.

Ultimately it is the equality bodies at Member State level which have the key role to play in responding to the challenges posed by the link between discrimination and poverty:

- Equality bodies that have a specific mandate in relation to the ground of socio-economic status need to build up their casework on this ground and need to share their experience of this casework more widely.
- All equality bodies need to respond to the barriers posed by poverty to the reporting of discrimination by engaging in partnerships with non-governmental organisations working on poverty issues and by developing outreach initiatives that specifically target people and groups living in poverty who are also covered by equal treatment legislation.
- All equality bodies need to include a focus on the poverty/discrimination link in their work on public policy. The research work, surveys, reports and recommendations of equality bodies needs to include a focus on this link so as to contribute to an effective public policy response to the poverty discrimination link and thus to the promotion of equality.