Equality Monitoring in an International Setting with specific reference to the EU region

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To cite this publication:
Jansen, Guido, Jackson, June,
Caplan, Andrew and
Franklin, Jane (2012),
Equality Monitoring
in an International Setting,
British Council: London

Booklet designed by Sônia Garcia
Equality Monitoring in an International Setting

with specific reference to the EU region

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This work is a collaboration between the British Council’s European Union region, the Diversity Unit and Equality Research and Consulting Ltd.
Foreword

At the British Council our global network of staff, partners and customers provide us with rich and deep insights into ways of developing a genuine and meaningful approach to equality and diversity.

One of the ways that we measure our success is through equality monitoring, a practice we have been engaged with for over ten years. Our focus to date has been on monitoring the equality profile of our UK contracted staff but we are increasingly extending this to our staff contracted in other countries and to the people we work with as well, as appropriate.

As part of this process, we have undertaken research into equality monitoring within our European Union region where countries strive to share commitments to equality and related legislation. This booklet presents the findings of that research interspersed by our own experiences and reflections.

It supports our efforts to extend our equality monitoring by providing us with information we need to inform our decisions and actions and by encouraging us to reflect. In addition it supports increased evidence-based approaches to equality, diversity and cultural relations, something we strive for to support the implementation of our global diversity strategy.

The research also helps address one of the challenges that we face. This is how to ensure that we adhere to core principles of equality and diversity whilst acknowledging and respecting cultural differences and local customs, practices and legal systems. This is clearly important when we look at equality monitoring of staff, of the organisations we work with, and of our customers.

Dr Fiona Bartels-Ellis, OBE
Head of Equality and Diversity
British Council
May 2012
The British Council is the UK’s principal cultural relations organisation, [http://www.britishcouncil.org](http://www.britishcouncil.org)

Our work focuses on the areas of arts, education and society and English and we have offices in over 100 countries and territories, organised into eight geographical regions.

We recognise the importance of equality and diversity to our work in cultural relations and believe that the exchange of experiences and perspectives in support of mutual understanding, respect, trust and social cohesion that determines this work must be nurtured.

This recognition has led us to develop a strong organisation-wide equality and diversity agenda, of which equality monitoring forms an important part. Indeed, it plays a contributory role to measuring our success in engaging with people from a wide range of backgrounds in the countries in which we work.

The focus of this publication is the research we have undertaken to look at how we can extend our equality monitoring practice. The research was commissioned by one of the British Council’s eight regions – the European Union (EU) region, comprising 28 countries which are listed in Appendix 1. Please note this does not include the UK, which is not in the British Council EU region but is drawn on as an example for equality monitoring practice. Given the confusion around equality monitoring and what is and what is not permissible in the countries in the EU Region, the research sought to address this and to provide us with the necessary clarity to help extend our related work.

With a particular focus on employment, the research aimed to answer the following key questions across the countries in our EU region:

1. What are the legal restrictions to equality monitoring data collection?

2. What are the practices and processes legally accepted to obtain the relevant data?

3. Are there already local equality monitoring data available which could be used as a benchmark by the British Council?

In addition, it was felt that it would be desirable to establish across the countries in our EU region:
- who are the main players, including any networks in equality monitoring
- whether there are any relevant reports on public opinion towards equality monitoring.
The focus of the research was European-wide legislation, specific country legal issues, and relevant research publications and documentation from legal experts, academics and existing European anti-discrimination and diversity networks. Some sources of benchmarking data were also identified and explored.

The methodology employed was principally desk research (literature search and internet search) and e-mail and telephone contact with organisations which were identified through a website search and/or suggested by our colleagues working across the region. The internet search was conducted using keywords (including anti-discrimination; equality monitoring; gender monitoring, ethnic monitoring, etc.). Information about the research and a request for any relevant information about equality monitoring practices in the region was sent to the members of EQUINET1 which is the European body for equality organisations.

What follows is a summary of the key issues and findings to come out of the research. It, in our view, debunks the myth of equality monitoring as a “no-go” area which, in our experience, is how this is sometimes represented across the region and more widely.

The publication summarises the research, and contributes to an informed debate on the merits and means for responsible and efficiently conducted equality monitoring.

Having already set out our commitment to equality and diversity and its importance to our work in cultural relations and the key research questions, we move, in the next section, to provide information about our own approach to equality monitoring. This is followed by a section on the need for clarity around data protection requirements and equality monitoring, and suggestions for how to reconcile the perceived conflict between the two. There is a further section on current equality monitoring and potential sources of benchmarking. A final section provides our conclusions and signals how equality monitoring might be taken forward across the EU region and beyond.

There are five accompanying appendices which provide a note of the countries covered by the research; equality monitoring currently undertaken by EU states; benchmarking population data regarding ethnicity and religion; a reference to the equality monitoring of Roma and Travellers; and a note of some illustrative examples of equality monitoring in institutions operating across Europe and in some individual European countries.

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1 EQUINET is the European Network of Equality Bodies which brings together 37 member organisations from 30 European countries. Equality Bodies were established across the Member States of the European Union to promote equality and to combat discrimination in the areas covered by the EU Equal Treatment Directives.
Our experience tells us that it is necessary to clarify what equality monitoring means. This is because, characteristic of much in the area of equal opportunities, there is confusion about both terminology and meaning.

This serves to undermine understanding and engagement and contributes to hindering action. Clarity is particularly important because of the personal nature of equality monitoring and disclosure of aspects of one’s identity. We believe that only with a clear understanding of what is being asked for and why will support and engagement be forthcoming and will the data collected be consistent and comprehensive enough to be meaningful.

In order to achieve such understanding, we have produced the following guidance for use within the British Council:

Equality monitoring is the collection of data against a range of categories relating to the Equality and Diversity agenda. The most common categories that are subject to monitoring are gender, age, disability, and in many cases, race or ethnic origin. Other categories often subject to monitoring include religion/belief and sexual orientation. Under-representation of each category is identified by comparing the data with local and national populations and other organisations and benchmarks.

Equality monitoring of our staff and people we work with enables us to develop a detailed picture of who we employ and who we work with and this in turn helps us to assess the impact of our Equal Opportunity Policy and Diversity Strategy. We are then able to examine our processes, identify trends and patterns, highlight progress made and note where further action is required to make sure that unjustified discrimination is eliminated and equality is promoted.
Our UK approach to equality monitoring has been developed in line with European legislation. Our initial focus in the early 2000s was on collecting staff equality monitoring data in relation to age, disability, ethnicity and gender. In 2006, following European Directives, we extended our categories to include religion/belief and sexual orientation. We have for some time now collected and analysed equality monitoring data relating to the majority of protected characteristics in the Equality Act 2010 of Britain, drawing on external authoritative guidance, including from the Equality and Human Rights Commission.

There are complete records for our UK contracted staff based on age, disability, ethnic origin and gender, with only a small number withholding any data. This is a marked improvement from a situation when response rates in the areas of ethnicity and disability had 5% and 19% gaps respectively. Response rates in some of the newer areas being monitored, in particular religion/belief and sexual orientation, have gradually increased each year, from 37% in 2006/07 to 75% in 2010/11.

In addition to this we collect comprehensive equality data on gender and age globally, via regional Human Resources teams, and limited customer and audience data, via our corporate scorecard questionnaire. Some countries have gone further than reporting on the centrally collated gender and age data and have collected and reported on other equality categories, such as ethnicity, disability and/or nationality.

In 2006/07 we undertook a pilot equality monitoring exercise of staff working in our offices across China and Central and South Asia (CSA). The response rate in all the categories of data requested was 41% (190) of staff in the China Region and 77% (403) of staff in the Central and South Asia region, with response rates from respondents to individual questions of between 70% to 95% in this region, depending on the specific topic.
In order to establish the best approach to extending monitoring, we first carried out benchmarking with ten public and private sector organisations working globally and we consulted with our own staff in a variety of locations. This led to recommendations of which categories to include in global monitoring. Piloting took place during the period November 2006 – March 2007 in the China and in the Central and South Asia regions.

We collected data on the following:

Age
Disability
Ethnic origin
Gender
Marital status
Nationality
Religion or belief
Sexual orientation
With and without dependants

Some areas need explanations more than others. For example, ‘bisexual’ was not widely understood. In addition, ‘eldercare’ needed explanation as people in these areas were used to discussions about equality and childcare, but not about including caring for older people under this heading of dependants.

Research by staff locally resulted in them choosing the ethnic origin categories to be selected from. In China local staff were from 5 different ethnic groups and in CSA region they were from 17 different ethnic groups.
List of ethnic groups of staff in China
Bai Zu
Han Zu
Hui Zu
Miao Zu
Tujia Zu

List of ethnic groups of staff in CSA
Azeri
Bengali
Brahman-Hill
Chettrri
Hazara
Kazakh
Muhajir
Newar
Pashtun
Persian
Punjabi
Russian
Sindhi
Tajik
Tatar
Ukrainian
Uzbek

In recent years, a majority of our offices have undertaken some equality monitoring of either staff or customers, or both. This has been driven by the requirements of our Diversity Assessment Framework, our overarching equality and diversity performance measurement tool.

The majority (71%) of our offices globally and 74% in our EU region, representing 20 of our 27 countries with offices, submitted evidence of staff equality monitoring in the Diversity Assessment Framework exercise for 2010 or 2011. Although the main focus of many countries was on gender and age, some reported data on other areas, for example disability, religion, or nationality. In addition, some provided data specifically of local relevance, for example the Cyprus office reported on having staff from the north and south of the country. Also, in the absence of collecting ethnicity data, a number of offices provided nationality data and others added some comparison with the profile of the local population.

In addition, the majority (67% of country offices globally and 89%, 24 of the 27 countries with offices in the EU region) had also carried out equality monitoring of customers; for example participants in leadership or young learners’ programmes and examination candidates. The categories collected were usually age and gender.

Equality monitoring is therefore a growing activity and an increasing aspect of our equality practice, involving numerous geographical areas and varying cultural contexts.

It is supported by some analysis and identified related actions. We acknowledge the areas of analysing and identifying actions related to equality monitoring are challenging and something we are striving to give more attention to.

It is perhaps useful at this stage to highlight the importance from our experience of two types of equality monitoring, reflecting social research practice generally. These are quantitative and qualitative equality monitoring.

Quantitative equality monitoring refers to numerical data collection and can be defined as a process by which statistical data is collected, stored, and ultimately analysed. This can be done regarding workforce composition and/or the composition of users of services, across the relevant equality grounds. The data can be collected by keeping personnel records, which are updated by individual staff members themselves and can be used to track progression, for example, promotion rates. Our equality monitoring of UK contracted staff is based on this approach. Alternatively ‘snapshot’ surveys can be undertaken. These are one-off surveys, often fully anonymised, which merely provide a picture of the profile of staff, or customers, at a point in time. The data is not linked to individuals’ records and can therefore not be tracked and no picture over time
can be established. This approach was used in our pilot exercise across China and Central and South Asia in 2006/07.

**Qualitative** monitoring, on the other hand, refers to non-numerical information gathered through other routes; for example interviews or focus group discussions, through which staff and/or customers can express the nature, extent or quality of their experiences or satisfaction. This kind of data is often perceived as being deeper and richer than quantitative data.

The two types of monitoring provide vital feedback for an organisation interested in improving its equality and more general performance and we undertake them both, recognising their relative merits. However, in the UK there is a focus on quantitative equality monitoring, helping to meet the requirements outlined in UK equality legislation, the aim of which is to explore the staff profile of organisations.

**Important points from our experience are:**

- Clarity about what equality monitoring is, the reasons for undertaking this and the relative merits of ongoing or snapshot approaches in the context of the rationale for undertaking equality monitoring;

- Careful handling and storing of data, particularly given the personal and sensitive nature of much of it, to which we refer later;

- Proper analysis and engagement with results of this process, to move the focus from data collection to action based on the results of the analysis of the data that has been collected.
We referred in the introduction to the confusion across the countries in our EU region around what data is legally permissible to collect for equality monitoring purposes. This is something that the research paid particular attention to. What was unearthed was a marked difference between the perception and the reality, with many grey areas as well as historical and cultural sensitivities fuelling this.

3.1 Anti-discrimination
The broad context for equality monitoring is provided by the EU Directives covering equal treatment of men and women, between persons irrespective of race or ethnic origin and, in employment, on grounds of age, disability, religion or belief and sexual orientation.2

Each Member State has its own specific anti-discrimination laws and in most cases have included all the grounds of discrimination found within the Directives.3 The majority of states have legislation in place that expressly prohibits direct and indirect discrimination, harassment and instruction to discriminate. In addition, almost all have an equality body responsible for implementing the Directives, or have incorporated the work of implementing these into an existing body such as a national human rights institute. A summary of these bodies, with some detail of areas they cover, are included in a study of the 27 EU Member states published by the European Union 2010 entitled Developing Anti-Discrimination Law in Europe, The 27 EU Member States compared (Chapter 11).

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2 The three anti-discrimination EU Directives are: 2000/43/EC implementing the principle of equal treatment between persons irrespective of racial or ethnic origin; 2000/78/EC establishing a general framework for equal treatment in employment and occupation; and 2006/54/EC on the implementation of the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation. This latter brings together in a single text the main provisions of earlier Directives on equal treatment of men and women.

3 Developing Anti-Discrimination Law in Europe, the 27 EU Member States compared, European Union (2010), p.8
The legislation is accompanied by a range of practices that help implementation. Included in such practices is equality monitoring, which needs to be considered in the context of each country’s data protection legislation.

3.2 Data protection

The legal framework governing data protection includes the overall EU regulations and national legislation. Together, these provide regulations on the collection, handling and storage of data, and are being interpreted by some in a rigid way which acts as a powerful disincentive to equality monitoring.

Data protection legislation varies in its detail depending on the individual country, however it usually involves some combination of the following principles:

Table 1 Common data protection principles

<table>
<thead>
<tr>
<th>Principle</th>
<th>Explanation – the data must be collected as follows:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal and clear reasons</td>
<td>compliant with the data protection legislation and with clarity about exactly what it will be used for</td>
</tr>
<tr>
<td>Focused</td>
<td>relevant to collect, holding in mind the rationale for collecting the data</td>
</tr>
<tr>
<td>Restricted use</td>
<td>only to be used for the purpose for which it is intended and stated</td>
</tr>
<tr>
<td>Consent</td>
<td>data subjects to be notified of data collected on them; they have the right to have access to their data and to have any inaccurate or misleading data corrected; individual consent, usually written, is expected</td>
</tr>
<tr>
<td>Data quality</td>
<td>accurate and, where necessary, kept up to date, complete and necessary for the given purpose</td>
</tr>
<tr>
<td>Security</td>
<td>kept carefully so that access to the data is limited and avoids unauthorised sight, alteration, disclosure, misuse or destruction</td>
</tr>
</tbody>
</table>

(4) Regulation (EC) No. 45/2001 relates to the protection of individuals with regard to the processing of personal data.
(5) Principles relating to data quality are in Chapter 2, Section 1, Article 4 of EC Regulation No. 45/2001
The data protection legislation, and the perception that this is in direct conflict with anti-discrimination legislation, results in limited equality monitoring taking place. For example, a legal expert in Hungary states:

_The practical result of these strict data protection rules is that public authorities have fully stopped collecting data concerning the sensitive grounds. This is obviously very detrimental from the point of view of monitoring discrimination in different fields of life._ (European Network of Legal Experts in the Non-discrimination Field, EU Country Reports 2009, Hungary Country Report, p.43).

Compounding this is the fact that, in several countries, equality monitoring by employers is open to suspicion on a variety of grounds, and this also acts to limit equality monitoring:

_The absence of the employer’s legitimate interest is presumed first of all in the case of questions which disproportionately concern the private life of the person applying for employment or which are not related to their suitability for the job offered._ (A comment from a legal expert in Estonia, in European Network of Legal Experts in the Non-discrimination Field, EU Country Reports, 2009, Estonia Country Report, p.30).

Whilst being conscious of the historical sensitivities around the collection of ethnicity data in particular (see section 3.3 below), it does appear that strictly enforced data protection measures can be directly counter-productive to good diversity and equality outcomes.

Indeed, as most states provide for positive action measures to prevent or compensate for disadvantages relating to one or more of the discrimination grounds, it is very hard to see how these can be identified without having sound equality monitoring data. The lack of data relating to those vulnerable to discrimination also makes it difficult to identify the extent of disadvantage and whether any progress is being made in reducing inequalities. This point has been stressed as follows:

_...it would be strange if, taken to extremes, the new data protection norms were interpreted so as to prohibit the gathering of ethnic data essential to document and challenge discrimination against these same minorities._ (Goldston, ‘Race and Ethnic Data: A Missing Resource in the Fight against Discrimination’ in Krizsan, Andrea (ed.), Ethnic Monitoring and Data Protection, the European Context 2001, p.30).

In recognition of the need to address this perceived conflict, several reports argue that the two (equality monitoring and data protection) can co-exist, as long as rules governing the handling of data are followed.⁶ This is particularly the case where the processing of ‘sensitive data’ can be justified on the grounds that it is needed in order to counteract discrimination against disadvantaged groups.

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⁶ See in particular the European handbook on equality data, 2007 and several of the Country Reports published by the European network of Legal Experts in the Non-discrimination Field, for example, Estonia, Hungary, Ireland, Malta and others.
A report published by the European Commission reinforces this point, arguing that, as well as helping to highlight potential inequalities, equality monitoring is most likely ‘the most effective measure an organisation can take to ensure it is in compliance with the equality laws’. A second report highlights a demand for equality monitoring:

...there is a considerable and compelling demand for collection of data in relation to the equality grounds. This demand is currently not satisfied, and it appears that it has not been fully understood in the legal and political cultures of the Member States. (Measuring Discrimination, Data Collection and EU Equality Law, European Commission, 2007, p.9).

With these challenges in mind, it is useful, we think, to now comment on differing attitudes to equality monitoring.

3.3 Attitudes to equality monitoring

The differing views, and the range of concerns and perceived conflicts with data protection, have led to a lack of consistency in equality monitoring practice. As noted above, the overarching EU Directives, and an increasing emphasis on having measurements in place, demonstrate progress. However, there is a still a lack of a joined up, comprehensive approach. Despite global diversity strategies, global indices in the field of equality tend to focus on gender, rather than on taking a more comprehensive account of equality. This results in limiting the opportunities to make direct comparisons with other organisations on the wide range of equality issues, let alone with other countries.

What is the barrier to being more joined up about this? The practice of equality monitoring has not, generally speaking, been popular for a complex mix of reasons, some of which are explored below.

As indicated in the previous section, there are historical sensitivities about the collection of some types of equality data. Indeed, for much of the twentieth century a considerable part of Europe lived under various kinds of authoritarian regimes in which there was justifiable suspicion of their government’s wish for population data on, for example, religion, ethnicity or sexual orientation. It was thought

(7) European handbook on equality data, 2006a, p.9
that this information would be used by police or other authorities for repressive measures. Indeed, we now know that these fears were not exaggerated and that statistical information has, in the hands of a malevolent regime, become an instrument of repression. This situation has entered the collective memory and somewhat tainted equality monitoring with the possibility of malign intent. Few who hold this position accept there is current danger but they prefer to be vigilant against even the remote possibility. Consequently, an argument for statistical monitoring is objected to, not on rational or ‘business case’ lines, but often more on hypothetical, ‘felt’, and historically-based ones.

Connected to this is the increasing quest to exercise free will, choice and autonomy around a number of matters governing life. This includes what aspects of one’s identity to share, or not, and indeed the increasing questioning of authority pronouncements, rules and regulations. Coupled with the complex relationship many have towards the equality agenda – both support for it and also intolerance of it – directives related to equality monitoring can be rebuffed on the basis of an affront to civil liberties.

Additionally, there is the increasingly complex and contested nature of identity itself. People have multiple and changing identities, with varying aspects of identity being prominent at varying points in time and in varying places and situations. For some, categorisation and the act of ticking a box and ascribing a characteristic to themselves is uncomfortable, sometimes appears to exclude them, can generate fear of being stereotyped, and therefore invites resistance. It belies their uniqueness and richness and can be perceived as inappropriately reductive.

Whilst this research did not find European/Europe wide equality monitoring studies or public opinion data sources specifically dealing with these matters, we as an organisation are acutely aware of the range of responses to this practice as a result of our own efforts to extend and embed equality monitoring. The apparent lack of studies on public opinion on equality monitoring across Europe is probably due to both the emerging nature of the legislation in some countries, the popular perception of a conflict with data protection and the difficulties in concluding what constitutes public opinion in this somewhat complex area. Of relevance to the matter of public opinion on this issue, however, is the report of the Eurobarometer survey carried out in 2006 which collected views on ‘equality versus individual freedom’.

Although there were differences between countries, overall this report concluded that European citizens want more equality and justice, even if this means less freedom for the individual. This desire reflects, to some extent, our position with respect to equality.

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(8) The European Commission monitors through the Eurobarometer survey changes in public opinion in the Member States. Surveys and studies address major topics concerning European citizenship: enlargement, social situation, health, culture, information technology, environment, the Euro, and defence amongst others.
monitoring. Our position holds that the organisational benefit of robust data to support evaluation of equality efforts and commitments warrants, and indeed requires, a commitment to equality monitoring. Of course, safeguards must be in place for the secure storage of data and the responsible usage of it. This is consistent with an increasing trend and requirement throughout the public sector generally to adopt evidence-based approaches, necessarily supported by robust data.

As a result of general negatively oriented attitudes to equality monitoring, we invest in explanation and guidance, briefings and debates, and leveraging the support and engagement of internal authority voices. We hold a consistent position about the value of equality monitoring across our organisation as a whole, but we recognise and are sensitive to our differing cultural contexts. It is clear that sharing the outcome of equality monitoring, by which we mean both the results and any recommendations, is a crucial part of engagement and nurturing support for the practice.

The key issue which appears to need addressing is a guarantee that data protection principles will be adhered to in terms of processing and holding any data and in ensuring anonymity in reporting. Related to this, several legal experts have highlighted the potential for reconciling equality monitoring and data protection legislation, something that we comment on below.
3.4 Reconciling equality monitoring and data protection in the countries across our EU region

Although there is no guarantee that it will be granted, permission to carry out equality monitoring can be sought from the relevant national data protection body in individual countries. The situation for each country is explained in a set of reports produced in 2009 by the European Network of Legal Experts in the Non-discrimination Field (on the grounds of Race or Ethnic Origin, Age, Disability, Religion or Belief and Sexual Orientation), established and managed by the Migration Policy Group and Human European Consultancy.9 One question posed to the legal experts (2.3.1 d), responded to in each of the country reports, and key to the issue of equality monitoring and data protection, is about the collection of statistical data, as follows:

The responses to this question provided information on procedures and their legal bases but, even more importantly, insights into the levels of sensitivity regarding specific equality issues in each of the EU countries.10 These range from permission to employers to keep a record of their employees in respect of a number of equality issues (as long as they follow certain criteria in the collection and processing of personal data), through to requirements that employers apply for authorisation from the relevant data protection body in order to collect such data. Ireland and Malta are the only countries included in this study where it appears to be straightforward to collect a relatively comprehensive set of equality monitoring data, as long as universally accepted data protection principles are adhered to. Most countries require some kind of authorisation to be sought from their national data protection agency (generally aside from age and gender monitoring).

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(9) European Network of Legal Experts in the Non-discrimination Field, EU country reports on measures to combat discrimination (2009) http://www.non-discrimination.net/sitemap

(10) The five grounds referred to are: Race or Ethnic Origin, Age, Disability, Religion or Belief and Sexual Orientation

(11) The reports are available in full on the Countries section of the website http://www.non-discrimination.net/sitemap
According to the legal reports consulted, it seems that it is not general practice for organisations to take the opportunity to request permission to undertake equality monitoring. Indeed, there appear to be assumptions at the local level that this will not be authorised.\(^{12}\) This may reflect a pragmatic understanding of local culture regarding the flexibility of national legislation and its judicial interpretation; a lack of interest in, and knowledge of, equality monitoring and its purposes; or merely the fact that to date this has not been a routine activity of employers. The developing anti-discrimination body of legislation, casework, and attendant media focus at a European level may alter consciousness about equality monitoring, and change this over time to a situation where it becomes more routine to request and obtain permission.

A possible approach for those who wish to undertake staff equality monitoring would be to proceed to carry out a ‘snapshot’ of the staff profile, collecting the data which is not restricted or categorised as ‘sensitive data’ in their particular country.\(^{13}\) This would be a one-off exercise. Taking this approach, however, means that requests for data have to be sent out each time an organisation wishes to report on staff profile. In addition, a ‘snapshot’ does not allow for monitoring over time, for example, and it means that career progression cannot be tracked. Neither does a snapshot cover issues such as staff or performance appraisal ratings, which would also need to be collected separately as a one-off exercise. For anyone wishing to extend equality monitoring beyond age and gender, unless the initial request for permission has been granted indefinitely, this may mean that frequent requests for permission would need to be made, thus incurring increasing amounts of staff time and therefore undue cost. What a snapshot would offer is experience of equality monitoring and engagement in the practice and associated processes. Some interesting and valuable information is likely to be surfaced leading to insights and reflections hitherto unavailable. Out of this may be a decision regarding if and how to progress equality monitoring.

A more sustainable approach would be to make an application to the national regulatory authorities for permission to monitor, taking care to stress the importance of equality monitoring in respect of implementing the equality directives and achieving results from this work, as well as the data protection safeguards. The upfront investment of time in seeking the necessary permissions will result in positioning equality monitoring as an important element in implementing equality policies, legislation and regulations.

\(^{12}\) See the European Network of Legal Experts in the Non-Discrimination Field reports

\(^{13}\) Ibid.
The research established that equality monitoring is carried out to differing degrees by a number of states and, to some extent, by public and private sector bodies across the countries in our EU region.

We looked at the websites of a sample of European-based organisations or made direct contact in order to identify a few examples of equality monitoring taking place in organisations with staff across Europe and in individual countries. This is neither a wide-ranging nor comprehensive sample, however the examples are illustrative of some current practice and we thought that these would be useful for other organisations. They are set out in Appendix 5.

In relation to the collection of equality data by states, for example through censuses, it is important to note that the collection of data relating to the population or workforce by individual states does not mean that this type of data can be automatically collected by any other bodies. However, starting with a look at what is collected by each state indicates areas which are generally considered to be more, or less, sensitive.

4.1 Population data
States collect equality monitoring data principally via population censuses, although a small number of countries no longer carry these out but collect relevant data via their Labour Force Survey or national statistics office. Danish and Finnish methods of collecting population data, for example, do not require citizens to periodically fill out a census form. Census information is extracted automatically, when needed, from administrative registers.

Where national censuses are carried out, the data is collected, published and disseminated by each country’s equivalent of a census or national statistics office. They vary greatly regarding the questions asked and how they are asked. The following two examples show different approaches taken to asking about ethnicity.

In the **Czech Republic 2011** census the question on ethnicity is open, with individuals able to insert their own in response to the invitation: ‘information is not obligatory. You may state two ethnicities’.

In the **Cyprus 2001** census the options are closed:
- Greek Cypriot
- Armenian
- Maronite
- Latin
- Turkish Cypriot

Examples of censuses for each country can be found on the United Nations Statistics Division website, and (with the exceptions of Denmark and Finland where population data is available from the national statistics agencies) the countries within the British Council EU region are included in the listing. National statistical offices may have more up-to-date versions of recent censuses available. All states collect monitoring on gender (male/female) and age; the picture is variable on disability, ethnicity and religion; and none collect data on sexual orientation.

(16) [http://unstats.un.org/unsd/demographic/sources/census/censusquest.htm](http://unstats.un.org/unsd/demographic/sources/census/censusquest.htm). These may not be the most recent censuses, as some took place in 2011 and may not yet be listed.

(17) The details are set out in Appendix 2.
4.2 Potential sources of benchmarking data

Despite the existence of extensive anti-discrimination legislation and practices across Europe, we have identified only limited specific examples of equality monitoring to serve as comparators (see Appendix 5). Apart from the UK, which was outside the scope of this study but serves as a comparator, and, to some extent, Ireland, little comprehensive data was found on a range of equality categories on either public or private sector websites. Generally, there appears to be no obstacle to collecting and reporting data on gender and age. However, local authorities and public sector bodies do not appear to be consistently publishing comprehensive equality monitoring information.

There are, however, some other sources of population and workforce data which could be drawn on for benchmarking purposes.

The World Factbook produces an online resource with details of each country and its population including ethnic groups and religion. The data from these sections relating to the countries in our EU region are set out in Appendix 3.

There are official statistics agencies which provide census data where available in each member state and links to these are provided on the United Nations Economic Commission for Europe website: http://live.unece.org/stats/links.html

Thirty nations in Europe have equality bodies who are members of EQUINET, the European network of such bodies and they each produce data and reports on a range of equality issues relevant to the individual country for which they are responsible.

Several sources serve to provide contextual data and some population data on specific equality areas (see table below). A separate statement on the situation regarding the equality monitoring of Roma and Travellers is provided in Appendix 4.

(19) See http://www.equineteurope.org/361.html for the full list of all the equality bodies on the EQUINET website.
<table>
<thead>
<tr>
<th>Equality categories</th>
<th>Potential source of benchmarking data/wider contextual information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>Eurostat Yearbook 2010 provides population by age data for the European countries.</td>
</tr>
<tr>
<td>Disability</td>
<td>Academic Network of European Disability Experts (ANED) country reports - ‘facts and figures’ section.</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>No overall comprehensive source regarding ethnicity data in Europe. A data source that may be of some relevance is: Migrants: MIPEX – Migrant Integration Policy Index, 2010.</td>
</tr>
<tr>
<td>Gender</td>
<td>Eurostat Yearbook 2010 provides employment rates for males and females. The European Institute for Gender Equality (EIGE) is developing a Gender Equality Index, the purpose of which is to provide a picture of gender equality in the EU and identify and monitor the state of play and progress at Member State level.</td>
</tr>
<tr>
<td>Religion</td>
<td>EUREL – a website on religion in Europe provides data on principal religions and denominations, including affiliation data from censuses or other sources where available in each European country.</td>
</tr>
<tr>
<td>Sexual orientation</td>
<td>ILGA-Europe (European Region of the International Lesbian, Gay, Bisexual, Trans &amp; Intersex Association) produces a Rainbow Europe Map and a Country Index which includes information for each country relating to legal situation and human rights.</td>
</tr>
<tr>
<td>Multiple equality categories</td>
<td>European Network of Legal Experts in the Non-Discrimination field produces individual country reports (the most recent full set are dated 2009, with 2010 reports being added), which provide extensive data relating to the legal situation regarding racial or ethnic origin, religion or belief, disability, age and sexual orientation.</td>
</tr>
</tbody>
</table>

Drawing on the above sources would be useful for an organisation which has collected equality monitoring data for its staff and/or customers and wants to put that in the wider country or regional context. This would be helpful, if relevant, in assessing performance regarding representation and participation in relation to national and international indices and population and workforce data. Clearly other benchmarking sources can also be explored.
The existence of differing European practices on equality monitoring is a result of several issues. These include variations in the levels of priority given to equality issues in some countries in our EU region and the cultural sensitivities regarding certain equality areas.

An overarching theme is the seemingly in-built contradiction between using sensitive data for positive, socially cohesive reforms, and protecting the sensitive areas of individual lives from the invasive probing of electronic supervision, control, and, potentially, repression. Despite this, all countries covered by this research have mechanisms to respond to requests for permission to carry out equality monitoring. Although these do not appear to be widely used, there is no reason why they cannot be, as long as a strong and nationally nuanced case is presented. This would need to be based on the local conditions specified in legal statute, the case histories of previous applications (which should be available from the national licensing authorities), and, in our particular case, our organisational record of securely handling and using sensitive equality monitoring data.

Given our international profile and our responsible approach to equality monitoring, it would seem that any reasonable application by us to monitor staff and, separately, the people we work with, would be given serious consideration. There is no reason to believe that this would not be the same for any organisation which has a track record in handling sensitive data. In making applications, hopefully with some success, we, and others, would not only be helping to enhance effective equality and diversity practice, but also taking a leadership role in developing detailed Europe-wide equality monitoring practice. This, in turn, would help to nurture and normalise equality
monitoring and enable areas of under and over-representation to be identified. It would provide evidence to support work on achieving equal access to employment and services and achieving equal outcomes in support of greater inclusion, with the overarching social and economic benefits that come from this. The reality is that exclusion costs in all sorts of ways, including in terms of violence, conflict, insecurity, political instability and reduced standards of living and welfare, hope and trust. Equality monitoring is not the answer to this but has the potential to make a modest contribution.

Following this research initiated by our EU Region and the insights it provides, it is our aim to develop a consistent and increasingly comprehensive approach to equality monitoring in the region and beyond. This will serve to support the implementation of our global diversity strategy.

By sharing this research we hope to provide helpful information for other organisations interested in initiating equality monitoring. For this purpose, we thought it might be useful to summarise our major insights in the form of:

**12 TOP TIPS**

next page
**Purpose**
Before embarking on equality monitoring, answer the questions: why are we thinking of doing it and what resources do we have to respond to what the data will tell us?

**Communication**
Communicate clearly the purpose of the proposed equality monitoring, what data will be gathered and how it will be gathered and handled. This should include who will have access to it, where it will be held, and the rights an individual has to check their data and make any amendments to it.

**Participatory approach**
Involve existing workforce bodies and structures such as works councils, trade unions and/or staff associations in the development of equality monitoring in the organisation.

**Organisational benefit**
Emphasise the contribution that having equality data makes to recognising and celebrating organisational achievement, or identifying and informing responses to organisational problems.

**Voluntary**
Ensure that it is clear to all that this is a voluntary exercise. You do need people to respond because data which is as complete as possible is needed to confidently identify any issues and patterns; however people can choose to answer some of the questions rather than all of them and they might also want to indicate that they ‘prefer not to say’ in response to some particular questions.

**Clarity**
Recognise that there may not be a shared understanding of what is meant by some equality areas. For example, we experienced confusion about the meaning of bisexual, in some contexts, and some colleagues reported not being used to defining themselves in terms of their ethnic group. Some areas of monitoring are deemed especially sensitive, in particular sexual orientation but disability status too, including in instances where there is a lack of clarity about the definition of a disability, and/or concerns about disclosing this information.
Specific sources
Decide what your sources of benchmarking data are. Collate these to have them ready for when you are analysing your data. They may be the equality profile of comparable organisations operating globally in a given context, local labour force data or the national census.

Independent analysis
Undertake analysis and preferably independent analysis as this helps preserve the integrity of the data. Quality is maintained by ensuring that the independent analysis is informed by a briefing from you about requirements and the nature and extent of analysis and reporting required.

Recommendations
Ensure that analysis leads to recommendations, both to improve the quality of the data where this is necessary but also to link to action to address under-representation or disadvantage.

Dissemination
Disseminate the action points identified and acted upon internally, and externally where appropriate, using different ways of representing the data to appeal to different preferences and avoid an over-reliance on words given the varying languages spoken amongst an international workforce.

Stories
Identify stories that help people understand the relevance and usefulness of data collection. One story we tell is how in some of our offices it is a case of ‘spot the man’ given the almost completely female workforce which in some instances has been the case for several years. We then have a discussion about why this is and what we can do about it. Another is how we have struggled to attract disabled participants on to some of our programmes and what action we have considered and taken as well as why we think this is. A further story is about the very young age profile of one of our offices, an issue revealed by our equality monitoring data, which led to studying benchmarking data and having discussions about whether or not we should be concerned.

Data protection
Adhere to all data protection principles and legal requirements which are applicable to the specific geographical context and provide assurances regarding these.
Legislation
EU Directive 2000/78/EC, 27th November 2000, establishing a general framework for equal treatment in employment and occupation

EU Directive 2000/43/EC, 29th June 2000, implementing the principle of equal treatment between persons irrespective of racial or ethnic origin

EU Directive 45/2001, 18th December 2000, on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data

EU Directive 2006/54/EC, 5th July 2006, on the implementation of equal opportunities and equal treatment of men and women in matters of employment and occupation

Data protection Act, Norway
http://www.dataprotection.eu/pmwiki/pmwiki.php?n=Main.NO

Data Protection Act, Switzerland
http://www.dataprotection.eu/pmwiki/pmwiki.php?n=Main.CH
Reports
Centre for Strategy & Evaluation Services (2003), Methods and Indicators to Measure the Cost-Effectiveness of Diversity Policies and Enterprises, Final Report

De Schutter, Olivier (2006), Three models of equality and European anti-discrimination law

European Commission (2003), The costs and benefits of diversity

European Commission (2005), The Business Case for Diversity, Good Practice in the Workplace

European Commission (2006a), European handbook on equality data – why and how to build to a national knowledge base on equality and discrimination on the grounds of racial and ethnic origin, religion and belief, disability, age and sexual orientation
http://www.libertysecurity.org/article1860.html


European Commission (2010), In search of a balance between the right to equality and other fundamental rights
http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=548&type=2&furtherPubs=no


European Union (2010), Developing Anti-Discrimination Law in Europe, The 27 EU Member States compared


Focus Migration (2010), Integration in plain figures? Approaches to integration monitoring in Germany, Policy Brief No. 16, May
Fundamental Rights Agency (2011), Migrants, minorities and employment, Exclusion and discrimination in the 27 Member States of the European Union

Glaude, Michael, Eurostat Directorate F (undated), Statistics on discrimination within the context of social statistics, main issues


**Networks and resources**

**ANED - Academic Network of European Disability Experts**
http://www.disability-europe.net/

**ENAR – European Network Against Racism**
http://www.enar-eu.org/

**EQUINET – European Network of Equality Bodies**
http://www.equinet-europe.org/
Plus list of equality bodies who are members of EQUINET
http://www.equinet-europe.org/-Member-organisations-
Note: Switzerland is not included in this list. They have a Federal Office for Gender Equality: http://www.ebg.admin.ch/index.html?lang=en and an association for human rights: http://www.humanrights.ch/home/en/Welcome/idcartart_10133-content.html

**European Monitoring Centre for Racism and Xenophobia**

**ECRI - European Commission against Racism and Intolerance**
http://www.coe.int/t/dghl/monitoring/ecri/sitemap_en.asp

**EIGE – European Institute for Gender Equality**
http://www.eige.europa.eu/content/brief-eige-history

**ERIO - The European Roma Information Office**
an international advocacy organisation which promotes political and public discussion on Roma issues by providing factual and in-depth information on a
range of policy issues to the European Union institutions, Roma civil organisations, governmental authorities and intergovernmental bodies
http://www.erionet.eu/

EUREL – website aiming to provide accurate and up-to-date information on the social and legal status of religion in Europe. Carried out by PRISME, a research unit of the CNRS and the University of Strasbourg

European Network of Legal Experts in the field of gender equality

European Network of Legal Experts in the Non-discrimination Field, EU country reports on measures to combat discrimination (2009)
http://www.non-discrimination.net/sitemap
(see ‘Countries’ section on webpage)

ILGA Europe, Equality for lesbian, gay, bisexual, trans and intersex people in Europe
http://www.ilga-europe.org/home/about_us/what_is_ilga_europe

Library of Congress, Business Reference services
http://www.loc.gov/rr/business/census/intlensus.html

National Statistics Offices, Europe

MIPEX – Migrant Integration Policy Index, 2010, British Council and Migration Policy Group,
http://www.mipex.eu/

United Nations Economic Commission for Europe
http://live.unece.org/stats/archive/01.01a.e.html

World Factbook, Guide to Country Comparisons section, CIA

**Data protection**

Data protection authorities of the member states of the European Union

Data protection authorities of the member states of the European Free Trade Association (includes Norway and Switzerland)
Appendix 1

List of the countries within the British Council EU region and covered by this study:

Austria
Belgium
Bulgaria
Cyprus
Czech Republic
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Italy
Latvia
Lithuania
Luxembourg
Malta
Netherlands
Norway
Poland
Portugal
Romania
Slovakia
Slovenia
Spain
Sweden
Switzerland
### Table 3: Equality data collected by EU region countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Age</th>
<th>Disability***</th>
<th>Ethnic or National Origin</th>
<th>Roma</th>
<th>Gender</th>
<th>Religion</th>
<th>Sexual orientation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Belgium</td>
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<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Bulgaria***</td>
<td>Yes</td>
<td>Some</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Cyprus</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
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<td>No</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
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<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>?</td>
<td>No</td>
</tr>
<tr>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Finland***</td>
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<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
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<td>France</td>
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<td>No</td>
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<td>No</td>
<td>No</td>
</tr>
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<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Greece</td>
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<td>Some</td>
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<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Hungary</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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</tr>
<tr>
<td>Ireland</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Italy</td>
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<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Latvia</td>
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<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Lithuania</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
# Country Discrimination Ground

<table>
<thead>
<tr>
<th>Country</th>
<th>Discrimination Ground</th>
<th>Age</th>
<th>Disability</th>
<th>Ethnic or National Origin</th>
<th>Roma</th>
<th>Gender</th>
<th>Religion</th>
<th>Sexual orientation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luxembourg</td>
<td></td>
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<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
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<td>Yes</td>
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<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
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<td>Netherlands***</td>
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<td>Yes</td>
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<td>No</td>
</tr>
<tr>
<td>Poland</td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
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</tr>
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<td>Portugal</td>
<td></td>
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<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Romania***</td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Slovakia</td>
<td></td>
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<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Slovenia</td>
<td></td>
<td>No</td>
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<td>Yes</td>
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<td>No</td>
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<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Sweden***</td>
<td></td>
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<td>No</td>
<td>No</td>
</tr>
<tr>
<td>UK</td>
<td></td>
<td>Yes</td>
<td>Some</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Additional countries required for this study</td>
<td></td>
<td>Yes</td>
<td>Yes*</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Norway</td>
<td></td>
<td>Yes</td>
<td>Yes**</td>
<td>Yes</td>
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<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Switzerland</td>
<td></td>
<td>Yes</td>
<td>Yes**</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

(20) Table adapted from the European Commission (2006), Measuring Discrimination: Data collection and EU Equality Law, p. 108, with the exception of the data for gender and the following countries: Denmark, Finland, Netherlands, Norway, Sweden and Switzerland, see sources references below the table.

(21) Information regarding whether Roma ethnic origin is included in the national censuses is included as a column beside ‘ethnic or national origin’ in this table. The data is from the Annex to the European Commission document ‘An EU Framework for National Roma integration up to 2020’

* Labour force survey
** Federal Statistics office
*** Bulgaria – National Statistics Institute (Note: disability = medically identified disability); Denmark – Statbank Denmark; Finland – Statistics Finland; Netherlands – Statistics Netherlands; Sweden – Statistics Sweden;
**** Some of the disability data is available from ANED reports – Academic Network of European Disability Experts
Data on ethnic groups and religion in the population of each country within the British Council EU region.

The following notes of categories and data is from the CIA World Factbook. This is not a recommended comprehensive list as it is not complete, particularly for all minority ethnic groups. However, it forms a useful reference point to contribute to benchmarking. A separate source for relevant categories in each country is the census and a link to country censuses, with some detailed included in Section 5.1 of the report, is [http://unstats.un.org/unsd/demographic/sources/census/censusquest.htm](http://unstats.un.org/unsd/demographic/sources/census/censusquest.htm)

Note: as some countries do not record ethnic origin data in comprehensive categories some of the lists are a mixture of country of origin and/or ethnic origin data.

<table>
<thead>
<tr>
<th>Country</th>
<th>Ethnic Groups in population</th>
<th>Religion in population</th>
</tr>
</thead>
</table>
| Austria       | Austrians 91.1%  
former Yugoslavs 4% (includes Croatians, Slovenes, Serbs, and Bosniaks)  
Turks 1.6%,  
German 0.9%  
other or unspecified 2.4% (2001 census) | Roman Catholic 73.6%  
Protestant 4.7%  
Muslim 4.2%  
other 3.5%  
unspecified 2%  
none 12% (2001 census) |
| Belgium       | Fleming 58%  
Walloon 31%  
mixed or other 11% | Roman Catholic 75%,  
other (includes Protestant) 25% |
| Bulgaria      | Bulgarian 83.9%  
Turk 9.4%  
Roma 4.7%  
other 2% (including Macedonian, Armenian, Tatar, Circassian) (2001 census) | Bulgarian Orthodox 82.6%  
Muslim 12.2%  
other Christian 1.2%  
other 4% (2001 census) |
| Cyprus        | Greek 77%  
Turkish 18%  
other 5% (2001) | Greek Orthodox 78%  
Muslim 18%  
other (includes Maronite and Armenian Apostolic) 4% |
| Czech Republic| Czech 90.4%  
Moravian 3.7%  
Slovak 1.9%  
other 4% (2001 census) | Roman Catholic 26.8%  
Protestant 2.1%  
other 3.3%  
unspecified 8.8% unaffiliated 59% (2001 census) |
<table>
<thead>
<tr>
<th>Country</th>
<th>Ethnic Groups in population</th>
<th>Religion in population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>Scandinavian Inuit Faroese German Turkish Iranian Somali</td>
<td>Evangelical Lutheran (official) 95% other Christian (includes Protestant and Roman Catholic) 3% Muslim 2%</td>
</tr>
<tr>
<td>Estonia</td>
<td>Estonian 68.7% Russian 25.6% Ukrainian 2.1% Belarusian 1.2% Finn 0.8% other 1.6% (2008 census)</td>
<td>Orthodox 12.8% other Christian (including Methodist, Seventh-Day Adventist Roman Catholic, Pentecostal) 1.4% unaffiliated 34.1% other and unspecified 32% none 6.1% (2000 census)</td>
</tr>
<tr>
<td>Finland</td>
<td>Finn 93.4% Swede 5.6% Russian 0.5% Estonian 0.3% Roma (Gypsy) 0.1% Sami 0.1% (2006)</td>
<td>Lutheran Church of Finland 82.5% Orthodox Church 1.1% other Christian 1.1% other 0.1% none 15.1% (2006)</td>
</tr>
<tr>
<td>France</td>
<td>Celtic and Latin with Teutonic, Slavic, North African, Indochinese, Basque minorities; overseas departments: black, white, mulatto, East Indian, Chinese, Amerindian</td>
<td>Roman Catholic 83%-88% Protestant 2% Jewish 1% Muslim 5%-10% unaffiliated 4%; overseas departments: Roman Catholic Protestant Hindu Muslim Buddhist Pagan</td>
</tr>
<tr>
<td>Germany</td>
<td>German 91.5% Turkish 2.4% other 6.1% (made up largely of Greek, Italian, Polish, Russian, Serbo-Croatian, Spanish)</td>
<td>Protestant 34% Roman Catholic 34% Muslim 3.7% unaffiliated or other 28.3%</td>
</tr>
<tr>
<td>Greece</td>
<td>Greek 93% other (foreign citizens) 7% (2001 census) note: percents represent citizenship, since Greece does not collect data on ethnicity</td>
<td>Greek Orthodox (official) 98% Muslim 1.3% other 0.7%</td>
</tr>
<tr>
<td>Hungary</td>
<td>Hungarian 92.3% Roma 1.9% other or unknown 5.8% (2001 census)</td>
<td>Roman Catholic 51.9% Calvinist 15.9% Lutheran 3% Greek Catholic 2.6% other Christian 1% other or unspecified 11.1% unaffiliated 14.5% (2001 census)</td>
</tr>
<tr>
<td>Country</td>
<td>Ethnic Groups in population</td>
<td>Religion in population</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Ireland</td>
<td>Irish 87.4%, other white 7.5%, Asian 1.3%, black 1.1%, mixed 1.1%, unspecified 1.6% (2006 census)</td>
<td>Roman Catholic 87.4% Church of Ireland 2.9% other Christian 1.9% other 2.1% unspecified 1.5% none 4.2% (2006 census)</td>
</tr>
<tr>
<td>Italy</td>
<td>Italian (includes small clusters of German-, French-, and Slovene-Italians in the north and Albanian-Italians and Greek-Italians in the south)</td>
<td>Roman Catholic 90% (approximately; about one-third practicing) other 10% (includes mature Protestant and Jewish communities and a Muslim immigrant community)</td>
</tr>
<tr>
<td>Latvia</td>
<td>Finn 93.4%, Swede 5.6%, Russian 0.5%, Estonian 0.3%, Roma (Gypsy) 0.1%, Sami 0.1% (2006)</td>
<td>Lutheran 19.6% Orthodox 15.3% other Christian 1% other 0.4% unspecified 63.7% (2006)</td>
</tr>
<tr>
<td>Lithuania</td>
<td>Latvian 59.3%, Russian 27.8%, Belarusian 3.6%, Ukrainian 2.5%, Polish 2.4%, Lithuanian 1.3% other 3.1% (2009)</td>
<td>Roman Catholic 79% Russian Orthodox 4.1% Protestant (including Lutheran and Evangelical Christian Baptist) 1.9% other or unspecified 5.5% none 9.5% (2001 census)</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>Luxembourger 63.1%, Portuguese 13.3%, French 4.5%, Italian 4.3%, German 2.3%, other EU 7.3% other 5.2% (2000 census)</td>
<td>Roman Catholic 87% other (includes Protestant Jewish, and Muslim) 13% (2000)</td>
</tr>
<tr>
<td>Malta</td>
<td>Maltese (descendants of ancient Carthaginians and Phoenicians with strong elements of Italian and other Mediterranean stock)</td>
<td>Roman Catholic (official) 98%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>Dutch 80.7% EU 5% Indonesian 2.4% Turkish 2.2% Surinamese 2% Moroccan 2% Caribbean 0.8% other 4.8% (2008 est.)</td>
<td>Roman Catholic 30% Dutch Reformed 11% Calvinist 6% other Protestant 3% Muslim 5.8% other 2.2% none 42% (2006)</td>
</tr>
<tr>
<td>Norway</td>
<td>Norwegian 94.4% (includes Sami, about 60,000) other European 3.6% other 2% (2007 estimate)</td>
<td>Church of Norway 85.7% Pentecostal 1% Roman Catholic 1% other Christian 2.4% Muslim 1.8% other 8.1% (2004)</td>
</tr>
<tr>
<td>Country</td>
<td>Ethnic Groups in population</td>
<td>Religion in population</td>
</tr>
<tr>
<td>-------------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Poland      | Polish 96.7%  
Germany 0.4%  
Belarusian 0.1%  
Ukrainian 0.1%  
other and unspecified 2.7% (2002 census) | Roman Catholic 89.8%  
(about 75% practicing)  
Eastern Orthodox 1.3%  
Protestant 0.3%  
other 0.3%  
unspecified 8.3% (2002) |
| Portugal    | homogeneous Mediterranean stock; citizens of black African descent who immigrated to mainland during decolonization number less than 100,000; since 1990 East Europeans have entered Portugal | Roman Catholic 84.5%  
other Christian 2.2%  
other 0.3%  
unknown 9%  
none 3.9% (2001 census) |
| Romania     | Romanian 89.5%  
Hungarian 6.6%  
Roma 2.5%  
Ukrainian 0.3%  
German 0.3%  
Russian 0.2%  
Turkish 0.2%  
other 0.4% (2002 census) | Eastern Orthodox (including all sub-denominations) 86.8%  
Protestant (various denominations including Reformat and Pentecostal) 7.5%  
Roman Catholic 4.7%  
other (mostly Muslim) unspecified 0.9%  
none 0.1% (2002 census) |
| Slovakia    | Romanian 89.5%  
Hungarian 6.6%  
Roma 2.5%  
Ukrainian 0.3%  
German 0.3%  
Russian 0.2%  
Turkish 0.2%  
other 0.4% (2002 census) | Roman Catholic 68.9%  
Protestant 10.8%  
Greek Catholic 4.1%  
other or unspecified 3.2%  
none 13% (2001 census) |
| Slovenia    | Slovene 83.1%  
Serb 2%  
Croat 1.8%  
Bosniak 1.1%  
other or unspecified 12% (2002 census) | Catholic 57.8%  
Muslim 2.4%  
Orthodox 2.3%  
other Christian 0.9%  
unaffiliated 3.5%  
other or unspecified 23%  
none 10.1% (2002 census) |
| Spain       | composite of Mediterranean and Nordic types                                                 | Roman Catholic 94%  
other 6% |
| Sweden      | indigenous population: Swedes with Finnish and Sami minorities foreign-born or first-generation immigrants: Finns, Yugoslavs, Danes, Norwegians, Greeks, Turks | Lutheran 87%  
other (includes Roman Catholic, Orthodox, Baptist, Muslim, Jewish, and Buddhist) 13% |
| Switzerland | German 65%  
French 18%  
Italian 10%  
Romansch 1%  
other 6% | Roman Catholic 41.8%  
Protestant 35.3%  
Muslim 4.3%  
Orthodox 1.8%  
other Christian 0.4%  
other 1%  
unspecified 4.3%  
none 11.1% (2000 census) |
Equality Monitoring of Roma and Travellers in Europe

To address the situation of the estimated 10 to 12 million Roma and Travellers, the Congress of Local and Regional Authorities of the Council of Europe organised a Summit of Mayors on Roma, in Strasbourg (France) on 22 September 2011.

The Summit was a response to the increasing discrimination against Roma in Europe and their social and economic marginalisation. The Strasbourg Declaration on Roma, adopted by the High-level Meeting of the Council of Europe member states on 20 October 2010, highlighted the particular importance of local and regional action to improve the situation of Roma.

http://www.romadecade.org/summit_of_mayors_on_roma

Roma civil organisations, governmental authorities and intergovernmental bodies. ERIO cooperates with a large network of organisations and acts to combat racial discrimination and social exclusion by raising awareness, lobbying and developing policy.

http://erionet.org/site/

The European Roma Rights Centre (ERRC) is an international public interest law organisation working to combat anti-Romani racism and human rights abuse of Roma through strategic litigation, research and policy development, advocacy and human rights education. Since its establishment in 1996, the ERRC has endeavoured to provide Roma with the tools necessary to combat discrimination and achieve equal access to justice, education, housing, health care and public services. The ERRC has consultative status with the Council of Europe, as well as with the Economic and Social Council of the United Nations. The ERRC’s strategic priorities for 2010 – 2012 include disaggregated data collection.

Appendix 5

Equality monitoring by individual organisations
We looked at the websites of a sample of European-based organisations or made direct contact in order to identify some examples of equality monitoring taking place in organisations with staff across Europe and in individual countries. The following are some illustrative examples of what we found (at July 2011). This does not imply that the data for each is complete – the amount of detail varies for each and these are illustrative examples.

Examples from international institutions in Europe

**European Commission** - The European Commission equality monitoring data for staff covers age, gender, nationality, job category and grade.

**European Investment Bank, Luxembourg** (also listed below, under the individual country Luxembourg) - includes in their annual diversity progress report 2009 staff profile data for age, gender and nationality. The gender data is looked at in most detail, with comparisons made for the professional category of staff with a number of other international organisations. This benchmark data is provided. The nationality data is presented in terms of ‘New’ and ‘Old’ Member States. It should be noted that the 2009 diversity progress report states ‘the focus is initially on gender and nationality but this will gradually evolve as results are achieved’, indicating an intention to extend equality monitoring over time.

**IDB** – Inter-American Development Bank. IDB have collected race/ethnicity data from job applicants since 2005 and in July 2010 introduced a self-identification system for staff (and consultants) to provide race/ethnicity data. They use a list of ethnic descriptions, which include ‘other’ so that people can self-identify using any other ethnic category. Although they have offices in Europe, the equality monitoring categories reflect the American head office and the equality categories listed are: indigenous; Afro-descent Latin America; Afro-descent Caribbean; Afro-descent N. America/other; Mixed race ethnicity; Asian; White/Caucasian; and Other.

**IMF** – International Monetary Fund. The diversity annual report includes data for staff by region, which includes a Europe region. The data is specifically on gender mix and nationality.

**OSCE** – Organisation for Security and Co-operation in Europe. Information on their website states commitment to

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(23) Although it is located in Luxembourg, the European Investment Bank (EIB) was created by the Treaty of Rome and shareholders are the Member States. The EIB Statute includes the statement: “In the selection of staff, account shall be taken not only of personal ability and qualifications but also of an equitable representation of nationals of Member States.”
increasing the representation of women in higher management. Historical data for women in these positions is provided, showing that in 2010 the representation of women in higher management positions reached a historic high of 31 per cent. The OSCE also report on nationality (only nationals of member countries can work in the organisation). Apart from collecting data on age for internal purposes (i.e. determination of time of retirement of staff) there is no collection/reporting in the areas of age, disability, religion or belief, or sexual orientation.

**Examples from individual countries**

*Not all countries of the EU region are represented in this list. These are just a section of the illustrative examples that we were able to find through an internet search and some direct contact with individual organisations.*

**Austria** – University of Vienna. In the Facts and Figures section on the university’s website, only gender data is provided. However, an academic paper looks at the age profile of staff in the university (Wallner et al, 2003).

**Belgium** – The City of Brussels. Collect equality data for their workforce on age, disability and gender.

**Cyprus** – Coco-mat reports on the diversity of staff regarding nationality, migrant status, religion and disability.

**Finland** – Nokia include in their annual report the gender profile of the senior management and also the percentage of those who are of non-Finnish nationality. Globally, age profile data is summarised in the sustainability report.

**Germany** – BASF’s summary equality monitoring data on their website refers to age and gender (providing data for all employees; management and professionals; and senior executives). In addition, they provide data for the proportion of applicants for senior executive positions who are ‘non-German’.

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(24) Information provided in an e-mail from OSCE to the researchers, 2.9.11
(25) E-mail communication between the researcher and the University of Vienna in July 2011 gained confirmation that the university’s monitoring activities are currently restricted to gender relations and income.
Greece – Coco-mat reports on the diversity of staff regarding nationality, migrant status, religion and disability.

Ireland – Trinity College Dublin’s annual equality monitoring report for 2010-2011 contains a section on staff which provides data on age, gender and disability. The gender data is crosstabulated by level of post, by promotion, and by full-time/part-time working.

Luxembourg – The European Investment Bank. Includes in their annual diversity progress report for 2009 staff profile data for age, gender and nationality (see section above for more details).

Malta – The National Commission for the Promotion of Equality (NCPE) website includes a racial and ethnic origin equality manual toolkit. This provides guidance to employers on equality monitoring of staff, with a list of ethnic categories set out from which staff can select. These are tailored to be relevant to race and ethnic groups in Malta. It is interesting to note that the NCPE requested and received financial and consultancy support, from the Royal Embassy of the Netherlands, to develop their work on the toolkit, which is aimed at employers and service providers.

Netherlands – Rabobank’s 2007 data available from their website quotes data for staff by age, ethnicity (data is for ‘ethnic minorities’) and gender. These are all crosstabulated by job scale groups.

Norway – BP’s annual report for 2010 reports on the gender profile of staff and the number who work on a part-time basis.

Spain – Banco de España’s annual report 2009 reports on the gender profile of staff, including those in management posts, and the number who work on a reduced hours basis. Data for women is updated in the 2010 report.

Sweden – Swedbank includes in their annual report the gender profile of staff in the various countries in which they operate. For the organisation overall, they report gender for all staff, directors and for other senior executives.

(26) Although it is located in Luxembourg, the European Investment Bank (EIB) was created by the Treaty of Rome and shareholders are the Member States. The EIB Statute includes the statement: “In the selection of staff, account shall be taken not only of personal ability and qualifications but also of an equitable representation of nationals of Member States.”