

TERMS OF REFERENCE

Investing in Equality: a decade of change for equality bodies

An Equinet Paper

SUBMISSION DEADLINE: 2 May 2017 (09:00 AM)

EQUINET

Equinet is the European Network of Equality Bodies, a membership organisation bringing together 46 equality bodies from 34 European countries including all EU Member States.

National equality bodies are public institutions established by law to promote equality and combat discrimination, on grounds including gender and gender identity, racial or ethnic origin, disability, age, sexual orientation, religion or belief and other grounds.

Equinet promotes equality in Europe through supporting and enabling the work of national equality bodies. It supports equality bodies to be independent and effective as valuable catalysts for more equal societies.

More information about Equinet and equality bodies is available [on the Equinet website](#).

OBJECTIVES

The Equinet Work Programme 2017 commits to commissioning ‘a study on the evolution of the mandates and resources of equality bodies over the past decade, to mark the tenth anniversary of the European Network of National Equality Bodies.’

The [Equinet Working Paper on Standards for National Equality Bodies \(2016\)](#) discusses four key indicators for evaluating the effectiveness of equality bodies, namely mandate, powers, independence and resources. The planned research will aim to elucidate the relationship between two of these indicators by investigating how the mandates and resources of national equality bodies have evolved over the past decade, including possible correlative relationships between them.

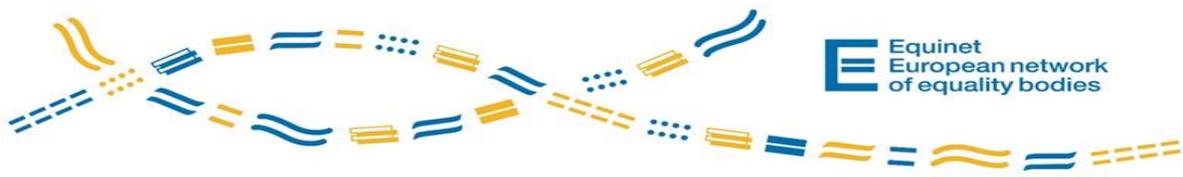
The study will be mainly descriptive in nature, distilling any lessons learned from the experiences and developments of the past decade, and concluding with a summary of policy implications for the promotion of equality in Europe.

Accordingly, the contractor will be expected to produce an Equinet paper. The purpose of the paper is to:

- Map the budgetary allocation and human resources for national equality bodies¹ in Europe as a function of
 - per capita GDP

¹ The scope will be determined in cooperation with the selected researchers.





- population size
- national budget size

in the period 2007-2017, taking into consideration potential mergers, creations and removals of bodies

- Provide an overview by describing a selected number of representative case studies, preferably comparing and contrasting cases of expanded and shrinking resources and analyzing underlying factors for the selected case studies
- Map the institutional evolution of national equality bodies' mandates in Europe from 2007-2017, providing an overview with case studies from member states²
- Compare and contrast the resulting mapping of budgets and mandates, analyzing any relationship between them
- Compare the results of the periodic Eurobarometer surveys (and any other European and national research found to be of relevance) with the corresponding levels of budgets and mandates in the relevant years, analyzing any relationship between perceptions of discrimination in the population with equality bodies' budgets and mandates, respectively
- Provide an analysis of the relationships uncovered, examining their relationship to public policy developments at national level in the field of antidiscrimination and equality.
- Provide conclusions on the evolution of budgets and mandates, including any relationship between these two indicators
- Provide recommendations in light of the research results addressed to Equinet, European Institutions, Members states and national institutions.

BACKGROUND & CONTEXT

The relevant EU Equal Treatment Directives³ require all EU Members States, accession countries and EEA countries to designate an equality body for the promotion of equal treatment. However, the Directives only provide minimum standards for the competences and limited functional independence of equality bodies, and do not guarantee complete independence, effectiveness, sufficient powers and adequate resources for equality bodies. As a consequence, Equinet has launched a debate within the network on what might be considered appropriate [standards for national equality bodies](#).

As part of this wider debate, Equinet has committed to gradually explore the implications of disparities in the degree of independence, effectiveness, powers and mandates for the work of national equality bodies and subsequently, the practical consequences for the implementation of equal treatment legislation in Europe.

With the current research, Equinet aims to start mapping the relationship between two of the four indicators identified as crucial for the effective functioning of equality bodies, namely resources (both human and financial) and mandates. It is hoped that the results of the

² Reference the Migration Policy Group report (2006) [Strategic Enforcement: Power and Competences of Equality Bodies](#), followed up in the annual reports of the European Network of Legal Experts on European Anti-Discrimination Law.

³ Directive 2000/43/EC (the so-called Race Directive), Directive 2004/113/EC (the so-called Gender Goods and Services Directive) and Directive 2006/54/EC (the so called Gender Recast Directive).



research will feed into the broader engagement about the need for appropriate standards for national equality bodies, as well as document the evolving situation of national equality bodies along these two dimensions over the past decade, marking the 10th anniversary of Equinet as the European Network of National Equality Bodies.

EXPECTED APPROACH

During the process, the contractor will be expected to:

- Conduct a review of relevant literature
- Conduct a review of national budget allocations for equality bodies as a function of per capita GDP in the period 2007-2017
- Conduct a review of the evolving mandates of national equality bodies in the period 2007-2017, taking into consideration potential mergers, creations and removals of bodies
- Conduct a survey of Equinet members to collect their inputs, perspective and information on the topic
- Conduct interviews with selected equality bodies (at least 6 interviews, observing a geographical balance and a balance in the mandate and competences of the equality bodies) that
 - Have experienced representative changes in their budgetary allocations
 - Have experienced representative changes in the evolution of their mandate
- Engage with key stakeholders, including the European Commission, national authorities and civil society
- Engage with the Equinet Executive Board, Secretariat and thematic Working Groups as appropriate

EXPECTED OUTPUT

The paper (to be produced in English) is expected to:

- Provide an overview of investment in national equality bodies in the period 2007-2017 as a function of per capita GDP
- Provide an overview of the evolution of mandates of national equality bodies in the period 2007-2017
- Provide an analysis of the evolution of mandates in light of public policy developments in the field of antidiscrimination within Member States
- Examine the underlying factors behind changes in budgetary situations in a selected number of representative case studies
- Examine the underlying factors behind changes in mandates in a selected number of representative case studies
- Analyze evidence of any relationship between evolutions in budgets and mandates
- Derive any lessons learned from the representative case studies, as well as from any relationship established between budgets and mandates
- Provide recommendations based on the lessons learned, including ideas and proposals for their effective implementation addressed to Equinet; European Union institutions, and Members States.

EXPERTISE REQUIREMENT

The selected expert(s) or team to be commissioned for this report/paper is expected to demonstrate:

- A track record of research (including quantitative) work in the field of equality and human rights
- Experience in statistical analysis and analyzing budgets
- Capacity to undertake an interdisciplinary approach
- Knowledge of the work of national equality bodies and their diversity an advantage
- Excellent drafting skills in English

SELECTION PROCESS

The Equinet Secretariat and Executive Board will select the winning tender.

In the selection process the following criteria will be taken into account:

- Price
- Demonstrated expertise in the field
- Quality and content of the proposal

The proposal offering the best value for money will be selected.

TIMEFRAME

The indicative timeframe for the commissioned paper is as follows:

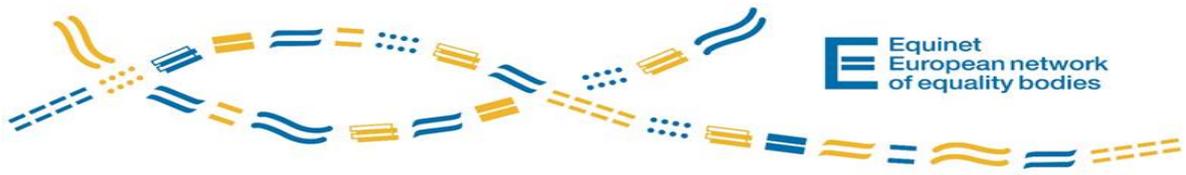
- Result of the selection process: 16 May 2017
- Start of the work in May 2017
- Present interim results to Equinet based on survey results and interviews conducted by 21 August 2017
- Draft paper presented to the Equinet Secretariat and Board by 11 September 2017 (the contractor might be invited to discuss the draft with the Equinet Board on 14 September 2017).
- The contractor might be invited to present the preliminary findings of the paper at the Equinet Annual General Meeting in Brussels on 10-11 October
- Completion of work expected at the end of October 2017

BUDGET

The maximum budget for the commissioning of this paper is **15.000 EUR** (VAT included).

Costs for travel (if and as necessary) or relating to presentation/discussion of the paper will be covered by Equinet separately (if and as necessary).

SUBMISSION OF PROPOSALS



A detailed proposal of the suggested approach, methodology and timeline as well as proposed budget and expert CV needs to be submitted by Tuesday **2 May 2017** (09:00 AM) to the attention of: Anne Gaspard, Equinet Executive Director: anne.gaspard@equineteurope.org

CONTACT PERSON FOR QUERIES

Katrine Steinfeld, Equinet Policy Officer

Email: katrine.steinfeld@equineteurope.org

Phone number: 0032 2 212 31 85

