

**GOOD PRACTICES
OF COLLECTING
< IN >
EQUALITY DATA**

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INTRODUCTION



Objectives of the report

Collecting data on the status of (in)equality and the prevalence of discrimination is a challenging task. It not only requires the adherence to scientific standards and the taking into account and combination of different data sources, it also necessitates the collaboration of different institution and stakeholders or the compliance with legal frameworks. In recent years, European states as well as the European Union have made considerable efforts to set up (in)equality data collection systems, to combat discrimination and other forms of intolerance and promote equality and to meet their obligations under national and international (human rights) law. Policies and concrete political measures can have a wide range of discriminatory impacts some of which are not always immediately identifiable. Thus, the constant collection of equality data is necessary to monitor the effects of policies on diverse issues of equality such as equal opportunities or discrimination. Collecting data on equality is not only beneficial for

Figure 1
Phases of the policy cycle and their role in data collection



individuals and groups concerned but also important for public authorities to be able to monitor social and equality policies as well as to be able to commune their efforts and capacity of action. It is, thus, necessary for legitimizing political action.

Collecting data on the status of (in)equality and the prevalence of discrimination is a challenging task. It not only requires the adherence to scientific standards and the taking into account and combination of different data sources, it also necessitates the collaboration of different institution and stakeholders or the compliance with legal frameworks. In recent years, European states as well as the European Union have made considerable efforts to set up (in)equality data collection systems, to combat discrimination and other forms of intolerance and promote equality and to meet their obligations under national and international (human rights) law. Policies and concrete political measures can have a wide range of discriminatory impacts some of which are not always immediately identifiable. Thus, the constant collection of equality data is necessary to monitor the effects of policies on diverse issues of equality such as equal opportunities or discrimination. Collecting data on equality is not only beneficial for individuals and groups concerned but also important for public authorities to be able to monitor social and equality policies as well as to be able to commune their efforts and capacity of action. It is, thus, necessary for legitimizing political action.

Obligations concerning the collection of equality data (examples)

The right to equality and non-discrimination is a fundamental right codified in the Croatian constitution and other Croatian laws such as in Article 4 and 6 of the Constitutional Act on the Rights of the National Minorities, Article 2 of the Labour Act, the Gender Equality Act or the Antidiscrimination Act. Furthermore, it is laid down in many international human rights treaties Croatia is a state party to.

The right to equality and the principle of non-discrimination are related but distinct concepts. The right to equality not only comprises equality before the law and the right to be equally protected by the state but also means to be equally able to participate in and have equal access to all fields of society. The principle of non-discrimination explicitly prohibits the exclusion of certain groups (e.g. ethnic minorities, women) from areas such as education, labour market or access to services. The principle of (non)discrimination

is, furthermore, spelled out in European Union law. The concept of discrimination laid down in the so-called EU equality directives (Council Directive 2000/43/EC, Council Directive 2000/78/EC, Council Directive 2004/113/EC, Directive 2006/54/EC) contains the following dimensions: direct discrimination, indirect discrimination, harassment and instruction to discrimination.¹

Direct discrimination is defined “to occur where one person is treated less favourably than another is, has been or would be treated in a comparable situation” (Council Directive 2000/43/EC, Art.1(1a)), e.g. when a man is denied access to a pub because of his colour of skin. Indirect discrimination refers to a situation where an apparently neutral provision, criterion or practice would put persons of a racial or ethnic origin or of one sex or having a particular religion or belief, a particular disability, a particular age, or a particular sexual orientation at a particular disadvantage compared with other persons. An example for indirect discrimination are part-time employees who are very often treated less favourably than full time employees. Due to gender roles most of part time workers are women, therefore this seemingly “neutral” stipulation constitutes an indirect discrimination on grounds of gender as the European Court of Justice ruled in 1986. Harassment shall be identified to be discrimination, when an unwanted conduct related to a protected ground takes place with the purpose or effect of violating the dignity of a person and of creating an intimidating, hostile, degrading, humiliating or offensive environment.

The equality directives also contain references on the collection of statistical data. For example, paragraph 37 of the preamble of the Council Directive 2006/54/EC states “For the sake of a better understanding of the different treatment of men and women in matters of employment and occupation, comparable statistics disaggregated by sex should continue to be developed, analysed and made available at the appropriate levels.”

The obligation to collect data on the status of equality or prevalence of discrimination is not explicitly laid down in international human rights instruments, however, as the *Report of the Special Rapporteur on contemporary forms*

¹ Article 2(2) of the Directive 2006/54/EC (equal treatment of men and women) additionally refers to following dimensions of discrimination: sexual harassment and any less favourable treatment of a woman related to pregnancy or maternity leave.

of racism, racial discrimination, xenophobia and related intolerance states,

[...] ethnic data could be considered as a component of the right to non-discrimination. [...] The State has a duty to ensure equality and that should be interpreted to include the duty to collect and analyse data disaggregated by ethnicity in order to identify inequality and monitor the effectiveness of measures implemented to remedy imbalances. (UN General Assembly 2015, Paragraph 18)

In addition, and as indicated in the previous quote, the duty to collect data is very often indirectly laid down in the context of the obligation of the State Parties to monitor the implementation of and compliance with the respective treaty. The obligation to monitor is a central concept in human rights law that is laid down in most international human rights instruments. While the term monitoring is used quite frequently, the actual substance and procedures of monitoring are not very well defined in international documents as well as in academic literature. Although practices of monitoring can be found in many forms, “there is limited guidance and perhaps even discussion on the scientific quality and validity of monitoring results [...]” (Yigen 2016, 7) However, the transparency of and systematic selection and application of standards, methods and procedures of data collection are an important precondition for monitoring in order to be able to assess the validity, reliability and objectivity of the collected information and to produce high-quality monitoring results.

There are several definitions of monitoring. The United Nations High Commissioner for Human Rights (OHCHR) defines monitoring as follows: “Monitoring is a broad term describing the active collection, verification and immediate use of information to address human rights problems.” (OHCHR 2001, 9)

It addition, a comprehensive monitoring requires not only to focus on human rights problems but to take into consideration human rights compliance in general. Furthermore, there is the need of a systematic and scientifically sound approach which includes that “[t]he compiled data will have to be analysed against agreed standards. These standards primarily entail the human rights obligations and commitments that the State is a party to, and thus has committed itself to live up to; as well as additional human rights provisions which have come to be recognized

as customary law applicable to all authorities regardless of the State's formal acknowledgement [...]"(Jacobsen 2008, 1)

Thus, monitoring usually contains elements of observation of the human rights situation, priority setting by defining the scope of monitoring (United Nations 2010, 117), collection of information (data), the systematisation, analysis and evaluation of this information according to a certain methodology and with reference to agreed standards, and the reporting or communication of the results of the process. There are usually two approaches to monitoring (Dueck, Guzmann, Verstappen 2001, 5):

- **Violation approach:** This approach focuses on the violation of recognised rights. It monitors the failures of state to ensure respecting, protecting and fulfilment of human rights such as equality or non-discrimination.
- **Progressive realisation approach:** This approach concentrates "on periodic evaluations of government efforts towards the realisation of (...) rights, and comparing the progress made during each period." (Dueck, Guzmann, Verstappen 2001, 5)

Especially the latter requires the collection of statistical data. For example, the *General Comment No. 1: Reporting by States parties* published by the Committee on Economic, Social and Cultural Rights (CESCR Committee) stipulates:

[...] the Committee wishes to note that the Covenant attaches particular importance to the concept of "progressive realization" of the relevant rights and, for that reason, the Committee urges States parties to include in their periodic reports information which shows the progress over time, with respect to the effective realization of the relevant rights. By the same token, it is clear that qualitative, as well as quantitative, data are required in order for an adequate assessment of the situation to be made. (CESCR Committee 1989, Article 7)

Two further important aspects of monitoring that should be emphasised are the aspect of time and the importance of communicating the results of the monitoring process to stakeholders in the form of recommendations or other interventions. The Toolkit prepared by the United Nations Development Programme (UNDP) and the OHCHR states that "[m]onitoring (...) provides periodic and regularly-collected data, sheds light on trends, signals progress

or deterioration, and suggests areas for priority action. In addition, monitoring generally is carried out over an extended period of time, and ought to be of an ongoing nature". (UNDP/OHCHR 2010, 22) The Toolkit indicates that suggestions for action, in other words, recommendations, are considered to be an essential part of the monitoring.

Some authors classify the human rights monitoring of laws as a distinct form of monitoring, that involves not only the studying of existing laws but also the scrutinizing of "bills that are being proposed, drafted, debated or passed in legislative bodies." (Guzman, Verstappen 2003, 30) In addition, it would also include the analysis of the implementation of these laws. However, laws can also be understood as a specific form of data and, thus, can be seen as a specific monitoring field that has to follow the same steps as human rights monitoring in general.

Figure 2
Monitoring steps



To sum up, monitoring is a systematic collection, evaluation and analysis of data in order to observe political and social processes and evaluate the impact of human rights laws and policies in general and equality and non-discrimination laws and policies in particular and the possible violations of legal obligations and/or progress made concerning the implementation of these laws and policies. Definitions on monitoring suggested by international institutions such as the OHCHR or the UNDP or laid down in different human rights instruments usually include several aspects. Firstly, they have an input dimension referring to the observation of the human rights situation, setting priorities by defining the scope of the monitoring activities as well as collection of information (data) on the human rights situation (human rights violations, developments of human rights laws, incidents of discrimination, equality situation, etc.). Secondly, monitoring refers to activities of processing data and information on human rights such as the systematisation and analysis of acquired data. Thirdly, monitoring requires activities which are directed either to

Why is data collection on (in) equality a challenge and what can we learn when we look at experiences and good practise in other countries and institutions

state officials and jurisdiction, the international level or the broader public – the output dimension – which includes the aspects of reporting but also giving advice and drafting recommendations or any other form of (legal) intervention. It also comprises follow-up activities concerning not only the improvement of the human rights situation including the situation on equality and discrimination but also the evaluation of the monitoring process as such.

Collecting data requires a great amount of resources, including time, knowledge, financial resources or personnel resources. The most important problems of collecting data on equality and non-discrimination are presented in section 2 of this report. They include a lack of collected data on specific grounds or categories, the lack of scientific rigour, the effort to ensure cooperation of various institutions, the methodological challenges hereof as well as with regard to taking account of the vast diversity of data sources, the obligation of taking into consideration legal frameworks concerning data protection, the challenges concerning the definition of categories and grounds of data collection or doing justice to the complexity of equality and discrimination, for example concerning the issue of intersectionality. Intersectionality refers to the fact that individuals are seldom defined by one equality dimension such as gender or ethnicity or class. Instead these dimensions are dynamically interrelated and sometimes assign individuals to quite contradictory social positions.

Thus, collecting (in)equality data requires expertise and experience. Different European countries or communities and cities have already gained diverse and sometimes long-standing experiences and know-how in the field of (in)equality data collection. To learn from and exchange these experiences does not only improve knowledge but also helps avoiding mistakes and, in doing so, saving time and financial resources. This report aims at contributing to this objective by introducing and discussing three examples of equality data collection in European countries: the setting up of a data collection system in Finland, the Equality and Human Rights Commission in Great Britain (ECHR), which has long-standing experiences especially concerning the collection of data on ethnicity and the Vienna Integration and Diversity Monitoring, a monitoring tool that aims at monitoring the impact of immigration as well as policy measures in this context at the level of the City of Vienna.

Outline of the report

Thus, collecting (in)equality data requires expertise and experience. Different European countries or communities and cities have already gained diverse and sometimes long-standing experiences and know-how in the field of (in)equality data collection. To learn from and exchange these experiences does not only improve knowledge but also helps avoiding mistakes and, in doing so, saving time and financial resources. This report aims at contributing to this objective by introducing and discussing three examples of equality data collection in European countries: the setting up of a data collection system in Finland, the Equality and Human Rights Commission in Great Britain (ECHR), which has long-standing experiences especially concerning the collection of data on ethnicity and the Vienna Integration and Diversity Monitoring, a monitoring tool that aims at monitoring the impact of immigration as well as policy measures in this context at the level of the City of Vienna.



**KEY TERMS OF
DATA COLLECTION
AND CHALLENGES
AND PROBLEMS
COLLECTING
EQUALITY DATA
WITH A SPECIFIC
FOCUS ON
ETHNIC ORIGIN
– A LITERATURE
REVIEW**



Data collection as a crucial part of monitoring compliance with human rights law, including laws and policies on (in)equality and non-discrimination

Collecting data is a key activity in the field of monitoring and refers to the collection of information on a specific human rights event, field or topic such as (in)equality and discrimination. Equality data contains information for describing, analysing and assessing conditions and issues of equality and discrimination events in a state or society.

Collecting data requires several decisions:

Determination of the objective of data collection

The definition of the objective of data collection in the context of monitoring is important as it helps to narrow down the task and as it is vital for the choice of methodology, procedures and timeframe of the data collection process. Objectives can be set to ascertain if equality laws are having the desired impact, to outline the prevalence of discrimination in a specific field or for specific groups, for example the living conditions of Roma or other minority groups.

Selection of specific fields and grounds of data collection

The decision on specific fields and grounds of data collection results should further narrow down the focus of data collection with respect to both data collection and legal obligations. In addition, it could also be influenced by political stakeholders, when there is a political interest to get information of a certain (in)equality situation in a specific local or national context.

Timeframe of data collection

According to the objective and fields of data collection it must be decided should the data be collected constantly, repeatedly, within a limited period of time or only once.

What are the methods and sources of data collection?

Data collection may include quantitative, statistical data as well as qualitative data and it may draw from primary sources, that is the direct collection of information by the institution itself, or from secondary sources, that is data collected by other institutions (such as universities, other administrative departments, NGOs, international organisations, etc). For a comprehensive and systematic monitoring, it is – depending of course on the objective of the specific monitoring effort – very often crucial to rely on several sources of data as one source of data might give only a limited picture of a certain equality field.¹

¹ For example, relying only on complaint data provides information on the reported cases of human rights violations but not on the prevalence of hu-

There are two methodologies mentioned in the literature of monitoring:

- The events-monitoring methodology refers to alleged incidents of human rights violations such as specific discrimination cases, court data or also specific case studies. This approach “involves identifying the various acts of commission and omission that constitute or lead to human rights violations. In other words, it is a concrete form by which the ‘violations’ approach takes shape.” (Guzman and Verstappen 2003, 28). This approach is limited as it only focuses on specific events and, thus, does not delineate a comprehensive and systematic picture of the prevalence of discrimination in a certain field.
- The indicator-based methodology is based on the idea that specific indicators, that is a specific type of information (data) in the form of numbers, concepts or standards, gives insight on “where something is, what direction it is leading to, and how far it is from that objective. It serves as a sign or symptom that tells what is wrong in a situation and helps in pointing out what needs to be done to fix the problem.” (Guzman and Verstappen 2003, 29) There are qualitative and quantitative indicators. And there are indicators that focus on or indicate/measure the input, process, output or outcome. The selection of indicators is a very important task and should be done considerately and methodically as the same indicators should be used over a longer period of time in order to be able to determine changes and progress.

It is important to note that both approaches are important, especially when they are used in combination. The events- or case study approach gives in-depth insight into the dynamics, process and structure of a situation and might be useful also for the indicator-based approach as it contributes to the development of accurate indicators. The indicator-based methodology may contribute to providing a more systematic and comprehensive picture of the human rights situation in a society.

Standards concerning the process and methods of data collection

man rights violations in a society or state in general. People might not launch complaints because they are not aware that their rights are violated, or they might have other reasons for not lodging a complaint (see Makkonen, Timo 2007b, 45).

It is important that data are collected according to transparent and agreed standards. There are usually four main criteria, which are important standards in regard to collecting and processing human rights data for monitoring: objectivity, impartiality, continuity and reliability. These four standards will be discussed in the next section as the effort to meet these standards is also a challenge in the context of collecting (in)equality data.

Documentation of data

“Documentation is the process of systematically recording the results” (Dueck, Guzman and Verstappen 2001, 4) of any process of data collection, e.g. interviews, surveys, collection of petitions or complaints, fact finding missions, case studies etc. Transparent and understandable documentation of the data collected is essential for a monitoring system.

Processing of data

Processing data refers to the process of extracting and assessing information from the previously collected and documented data. The two most important operations in this regard are the cataloguing and analysing of data. Cataloguing requires the systematisation and analysing requires the assessment of the acquired data according to specific national or international benchmarks and standards, i.e. national and international human rights treaties and laws. Thus, cataloguing and analysing also implies an act of measuring a particular social phenomenon on the basis of previously agreed indicator(s) and/or concept(s) in order to be able to relate it to a specific (human rights) aim or to specific (human rights) priorities.

Figure 3
Important
decisions for data
collection



The analysis of data should follow the same standards as the collection of data. This means that

- The methods and procedures used in processing and analysing the data shall be compliant with established professional standards, systematic methods and principles of professional ethics. Thus, it might be useful to adopt guidelines that lay down how and with which

methods the collected data are assessed and analysed and what are the standards against which the data are measured.

- The analysis of data should not only use standardised approaches with respect to definitions, classifications, categorization and indicators, it shall also be consistent in terms of content, terminology, procedures and methods of analysis.

Literature review and summary of what are the basic challenges of collecting equality data focusing on data on ethnic origin

There are many types of analysis including statistical analysis, descriptive analysis, sociological analysis and interpretation of interviews, document analysis, discursive analysis etc. It is important to follow standardized and transparent processes of analysis as they enhance the quality of the monitoring and, in doing so, the quality of the output

Reviewing the literature, it is striking that in most EU member states several problems seem to stand out concerning systems for collecting equality data for the purpose of monitoring:

- **Lack of data:** There is a lack of systematic, regular and comprehensive collection of data (see for example Chopin, Farkas and Germaine 2014; Makkonen 2007a; 2016). As Makkonen pointed out in the European handbook on equality data, that, although all European countries have adopted some action to collect and utilise equality data, there are still problems in regard to the following issues: the gathering of data is not systematically planned or carried out, the data shows a tendency to be collected occasionally and not on a regular basis, the data is restricted to some grounds of discrimination, it is calculated from proxy indicators which suggest that the results are not fully representative of the target groups, data tends to focus only on some areas of life and it tends to provide only limited informational content (Makkonen 2016, 12).

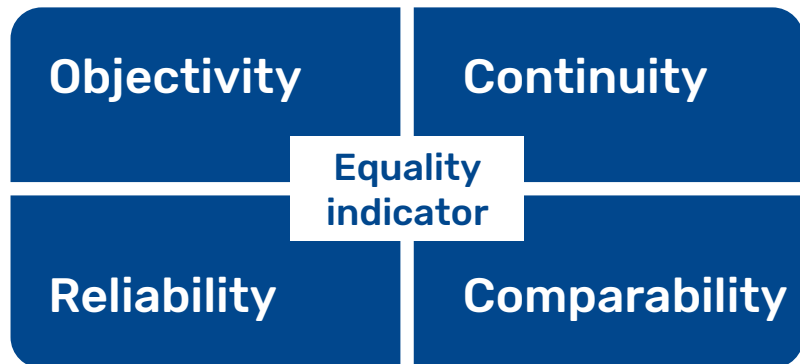
- **Objectivity, continuity, reliability and comparability of data:** These four terms refer to the quality, validity and accuracy of data in general and concern methodological issues which may prove to be quite complex and time-consuming.

Objectivity means “that the information should be collected with scientific rigour according to canons of good social science methodology” (Wrench 2011, p. 1718). Objectivity is also an indispensable criterion for collecting complaints

data, meaning the gathering of the data should also follow standardised principles.

Continuity refers to the fact that it is necessary to collect data on a regular basis and from the same sources. This enables the development of time-series and trend analysis, provided that categories are kept stable to allow for comparability.

Figure 3
Standards for
collecting data,
graph taken from
Manolakos and
Mayrhofer (2013, 16)



Reliability means that the data reflects the observed phenomena as accurate as possible and delivers the same results at repeated trials of measurement.

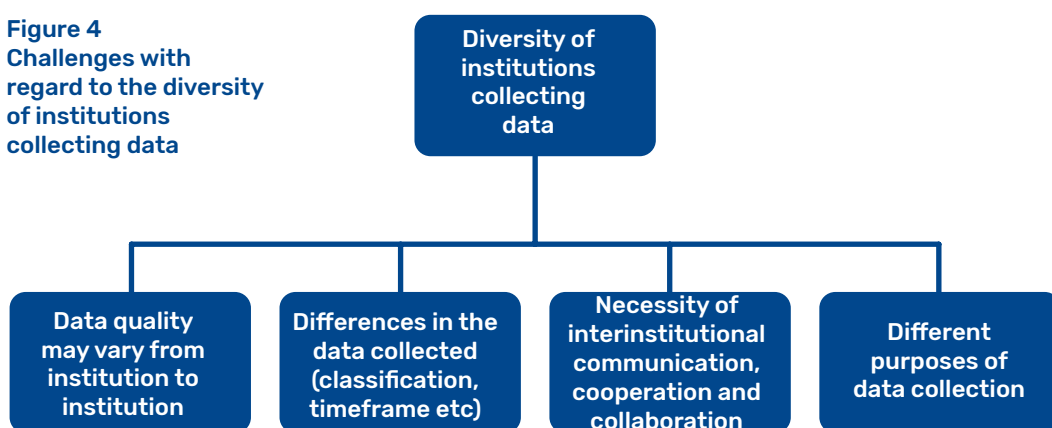
The issue of comparability refers to the question if data are measuring the same concept. Concerning the comparison of data between EU member states “[c]omparability would mean that a particular indicator of inequality or discrimination in one member state would have equal validity in terms of its meaning in another, thus allowing a reasoned judgement to be made that, for example, a level of inequality or discrimination is greater or lesser in one member state than another” (Wrench 2011, 1718). Yet, the problem does not only occur as a lack of comparability between states, it also is significant regarding the comparability of data within states (e.g. the comparability of data of different social fields). This might be because in most states different institutions are responsible for gathering data and there is often a lack of standardised and common data collection methods and/or statistical categories.

- *Diversity of data sources:* A major challenge concerning the collection of equality constitutes the diversity of data sources. The European handbook on equality data mentions official statistics, complaints data, research and diversity monitoring by organisations. Official statistics include population censuses, household surveys

and administrative registers. Another important source for compiling data on equality and discrimination are complaints data gathered either on a formal basis by the police, courts of law, tribunals and other bodies or on an informal basis by other organisations such as NGOs. As official statistics and complaints data only provide an incomplete picture concerning the monitoring of discrimination another field of gathering information is research – including victim surveys, self-report surveys, discrimination testing, qualitative and other research – as well as diversity monitoring by organisations (Makkonen 2016, 51-93; see also Guzman and Verstappen 2003, 24).

• *Diversity of institutions collecting data:* Censuses, data collection by administrative registers, surveys, research et al are carried out by a multitude of different public and private actors. This raises not only serious concerns regarding objectivity, reliability and comparability, but also proves to be a challenge for inter-institutional

Figure 4
Challenges with regard to the diversity of institutions collecting data



communication, cooperation and collaboration as there is the necessity of using the same definitions, categorisations, timeframes and indicators.

• *Legal framework* concerning data protection: As the collection of equality data may include the gathering and processing of so-called sensitive data as well, the setting up of data collection systems in order to gather data on ethnicity and racial discrimination has to take into account the legal framework concerning the protection of data, which in some countries is not adequately defined and regulated.

- There is an *ambivalence* concerning the definition and classification of ethnic groups and minorities based on the tension between the necessity of defining those criteria to combat discrimination and the historical experience of discriminating, suppressing and excluding specific groups of people i.e. minorities or religious and/or ethnic groups from their political, economic, social and cultural rights. The gathering of information on the ethnicity or race of individuals therefore requires two problematic decisions: “the definition of ethnic or racial categories and the choice of criteria on the basis of which people will be sorted out into them” (Ringelheim 2011, 1686). This means, that not only determining ethnical and racial categories but also the method of assigning persons to a particular group are contentious and highly political issues.

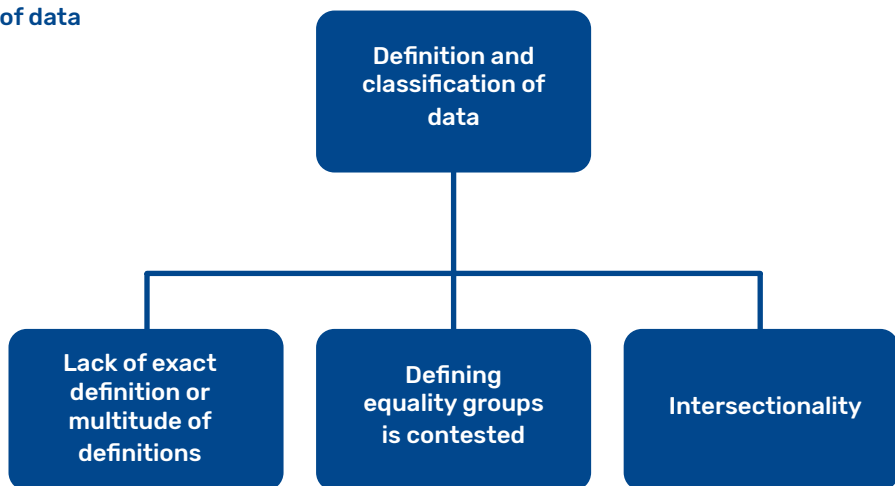
- In addition, there is also a lack of an exact definition of several concepts that are important for the collection of data, such as the concept of sexual orientation, gender, disability or the concept of “*ethnic origin*”. For example, concerning the definition of ethnicity “[i]t is already hard to decide what ‘ethnicity’ covers, but breaking it down into statistical categories is even harder.” (Simon 2007, 27) Concerning the question of racial or ethnic classification European countries are mainly applying two methods: self-identification by the person concerned and identification by a third party based on certain criteria such as birthplace or nationality of origin (ibid, 40). In national censuses, the practices of self-identification may cause profound difficulties, because self-identification and identification by others may not overlap in many cases leading either to under-reporting or in some cases even to over-reporting of the actual numbers of people belonging to certain groups (see Ringelheim 2011, 1686-1689).

- Not only the decision which groups should be taken into consideration for statistical purposes, but also the very act of *defining equality* groups as such is *highly* contested. For example, the definition of ethnic groups is said to reinforce differences and stereotypes. There is the concern that “racial categories are invented to represent a proxy for people’s cultural behaviour, but are then claimed to reflect unmeasured underlying ‘real’ characteristics of all members of the group. The categories are ‘reified’, they become more solid and meaningful than is reasonable to assume.” (Simpson

2004, 663) Furthermore, the groups concerned might be presented as “problematic” groups and therefore reinforcing and/or producing stigmatisation.

•Concerning the collection of data on certain predefined groups a further point of criticism is voiced in regard to the danger of narrowing down the analysis by focusing too much on one inequality dimension and neglecting issues of intersectionality. Intersectionality is still an evolving concept. However, the basic assumption is that different inequality categories are related to each other: “Race, class, gender, sexuality, age, ability, nation, ethnicity, and similar categories of analysis are best understood in relational terms rather than in isolation from one another. [...] These mutually constructing categories underlie and shape intersecting systems of power; the power relations of racism and sexism, for example, are interrelated.” (Hill Collins 2015, 14) Thus, focussing on one category bears the risk to neglect other variables and categories that might provide more insight into the causes of discrimination and structures of inequalities (e.g. economic variables). Therefore, for example, there might be the danger in statistical analysis of race “that association between racial categories and other characteristics is wrongly taken to imply that the racial identification causes the other characteristics” (Simpson 2004, 663).

Figure 5
Challenges concerning
the definition and
classification of data



A further challenge and disputed point is the question to which end data collection in particular and monitoring in general are carried out. Very often one of the main purposes of data collection and monitoring is described as to “guide policy and legal development: Decision makers at both the European and national level need comprehensive and reliable information when facing questions concerning appropriate policies, legislation and effective remedies for addressing the problem of discrimination. This is true for national equality bodies, ombudsmen and NGOs to plan and carry out their work efficiently.” (Makkonen 2007b, 12) Monitoring as a basis for political intervention is used quite commonly. However, the point is that statistical data is not self-explanatory, it can be interpreted to back up quite a range of policies and, for example, the failure of unpopular political measures might be justified (see Schönwälder 2009, 45). The use of monitoring is often driven by a political agenda, which is not rooted in the data itself, but in the purposes of collecting data . However, there is the possibility that the tool of monitoring might be used for hiding a specific political agenda.

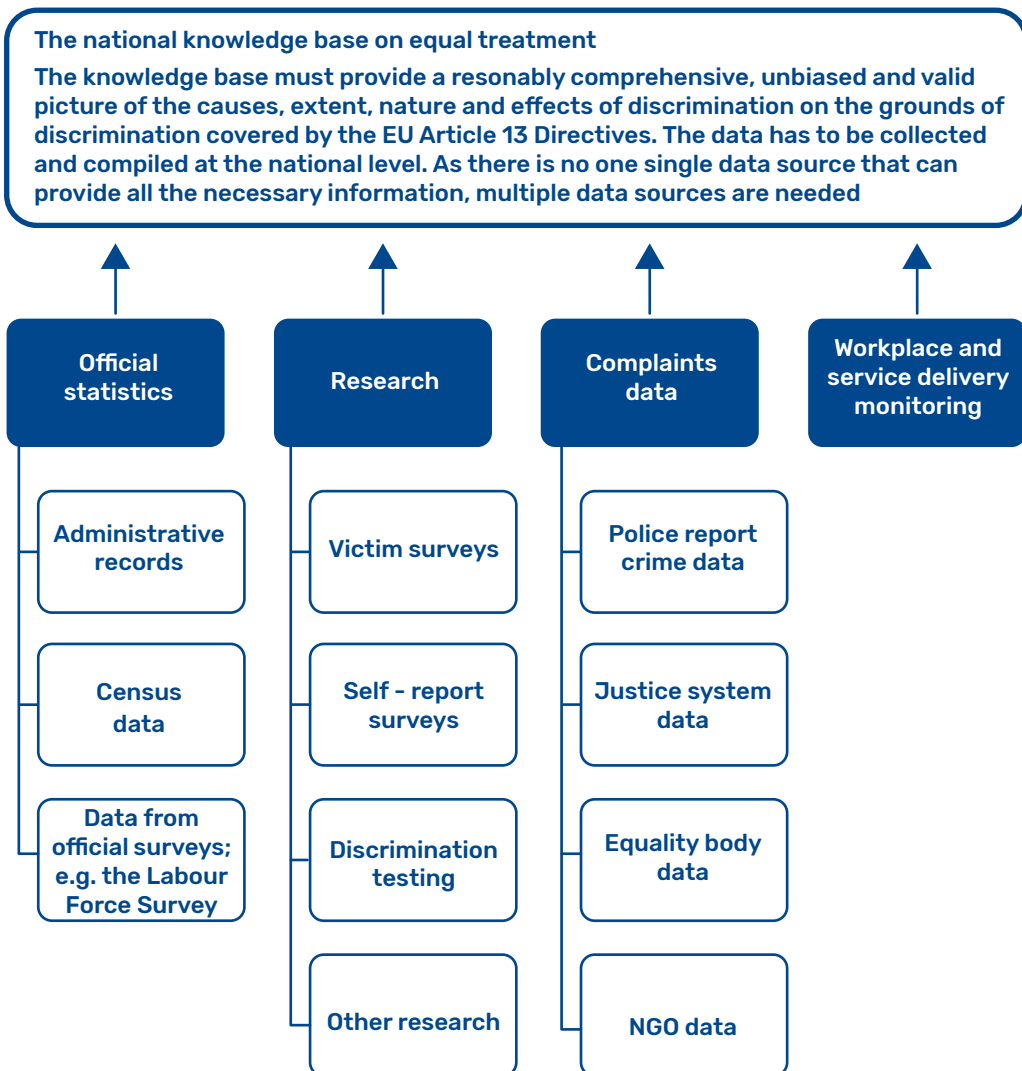


**REVIEWING
DIFFERENT
SOURCES
OF DATA
COLLECTION
AND THEIR
CHALLENGES**



As mentioned above one of the major challenges concerning data is the existence of various sources of data. Setting up a data collection system in Finland, the monitoring activities of the ECHR in the UK as well as the Vienna Integration and Diversity Monitor started to deploy and combine various sources of equality data to get the most comprehensive and complete picture of discrimination and inequality issues as possible. In the following outline the most important sources of equality data for monitoring (in)equality and anti-discrimination as described by the literature (i.e. Makkonen 2016, 31-93; 2007a; 49-96; 2007b; Olli and Olsen 2006, 34-47; see also Olsen 2012; Sapsford and Jupp, 2006). Makkonen (2016; 2007a) mentions official statistics, complaints data and research as important sources of equality data. In the following section these sources will be described shortly.

Figure 6
The different data sources for the compilation of equality data, taken from Makkonen (2007a, 32).



Official Statistics Official statistics include traditional population censuses, household surveys and administrative registers (Makkonen 2016, 53-71). Traditional population censuses are still carried out in many EU member states, although in some countries they have been recently abolished (e.g. Austria) and replaced or complemented by household surveys or the use of administrative registers (Makkonen 2007a, 52). The example of population censuses illustrates how sensitive data collection can be depending on national history and experiences. In Germany, traditional census-taking was abandoned after 1987, because of its highly controversial character, as people felt that the state was snooping in their lives (see Simon 2007, 58). Especially the inclusion of data on ethnic origin and minorities are quite disputed issues (see e.g. Ringelheim 2011; Simon 2005; Simpson 2004; Southworth 2001). However, the “data collected in the course of production of official statistics is regularly of such nature that it reflects nation-wide processes and particularly outcomes of these processes. As such, they can be used to develop a set of indicators that measure the state of the nation.” (Makkonen 2007a, 49) As Makkonen further emphasises considerable effort was put into the development of equality indicators, especially concerning disability and ethnic origin. These indicators can be used to measure the state of equality regarding two dimensions:

- “Indicators that measure the situation of a particular equality group in a particular field of life (such as education or employment); or
- Indicators that compare the situation of a particular equality group to that of the other groups in a particular field of life.” (ibid., 50)

Household surveys are carried out to cover “particular subject matters in greater detail than censuses” (Makkonen 2007a, 56). Surveys are usually carried out as sample surveys, they collect data on a representative sample of the population. They very often cover different and specialised topics such as employment, education, health, social services, housing and other issues. There are also surveys focusing on specific target groups such as ethnic minorities or immigrants (Olli and Olsen 2006, 34). A prominent example for such a survey is the Labour Force Survey conducted both quarterly and annually in all EU member states. It is the most important source for employment and unemployment statistics in the EU and collects comparable statistical data “on the level and

pattern of trends in employment and unemployment in the Member states” (ibid.).

Especially Northern European countries, including Denmark, Finland, Germany, the Netherlands, Norway and Sweden, rely exclusively on administrative registers instead of traditional censuses. Yet, all countries maintain administrative records, but these registers vary considerably in regard to the quantity and quality of the data collected. “In most societies it is almost impossible to participate in the labour market without leaving any trace in the administrative registers. (...) The above national registers are established for administrative purposes, e.g. to calculate taxes, pensions rights and unemployment benefits. From the perspective of showing the differences between individuals and groups in society, these registers provide valuable data for constructing life histories and comparing differences between groups of individuals.” (Ollis and Olsen 2006, 35)

Although administrative registers are important sources of information also in the field of equality data they are limited by the fact that they very often collect data only for the purpose they were created. Therefore, such data may show big gaps regarding specific equality groups such as ethnic origin or national minorities. “To remedy these shortcomings it should be investigated whether the necessary variables could, in the future, be added to the list of information collected, or whether it is possible to use proxy indicators – such as parents’ place of birth for ethnicity – for compiling equality statistics.” (Makkonen 2007a, 60)

Complaints data

Another important source for compiling data on equality and discrimination are complaints data gathered either on a formal basis by

- the police,
- judiciary and courts of law,
- tribunals and equality bodies,
- or on an informal basis by other organisations such as NGOs.

Although very important, these data raise serious questions whether they can indicate the degree and prevalence of discrimination because of under-reporting¹. It is assumed,

¹ Under-reporting means that victims of discrimination abstain from reporting the

that complaints data represent “the tip of the iceberg” (Wrench 2011, 1720), because the reporting threshold is too high for many individuals. Nevertheless, they are an important source, because they can “for instance provide a point of comparison to the results of victim surveys, and can form a rich source for qualitative research [...] that can reveal important aspects about the contexts in which discrimination takes place, and the motives, reasons and arguments put forth by the parties.” (Makkonen 2016, 72) However, as Olli and Olsen have noticed “complaints data can help in establishing discrimination against a particular risk population group within a particular policy domain, but complaints data cannot be used to demonstrate or document non-existence of discrimination” (Olli and Olsen 2006, 46).

Research

Although complaints data is a valuable source concerning equality data, it is important to mention that those data might lack comparability because data from different sources (equality bodies, judiciary, NGOs) diverge in regard to the information they collect or the categories they use. Therefore, “the establishment of an identical framework for data collection on individual complaints” is recommendable (ibid, 47).

As official statistics and complaints data only provide an incomplete picture concerning the monitoring of discrimination, another field of gathering information is research – including victim surveys, self-report surveys, discrimination testing, qualitative and other research – as well as diversity monitoring by organisations. Makkonen (2016, 34-35) describes victim surveys, self-report surveys, discrimination testing, qualitative research and other types of research as the most important sources for gaining equality and discrimination data:

- Victim surveys collect data on alleged incidents of discrimination or crimes. The aim of such studies is to question victims of crime or discrimination and get information on the discrimination/crime experienced, the circumstances and the effects of discrimination and sometimes also on the action – If taken – to remedy the situation, the knowledge of rights, the trust in the justice system and the fear of victimisation (Makkonen 2007a,

incident to the authorities. There are many reasons why victims of discriminations may not report their complaint: lack of knowledge about complaint procedures or rights, distrust of public and juridical institutions and lack of awareness of being a victim of discrimination

69-70). Olli and Olsen (2006, p. 36-37) point out several questions which surveys on discrimination experiences may address:

- Prevalence, incidence or general assessment of discrimination?
 - Experienced or perceived discrimination/crime?
 - Against which group?
 - During which period?
 - What is the available information about the context of reported discrimination?
- Self-report surveys are similar to victim surveys. However, the “major difference between the two lies in the subject of inquiry: self-report surveys focus on the respondent’s behaviour or attitudes, not on what has happened to him or her” (Makkonen 2007a, 73). There are mainly two types of self-report surveys: The first ones concentrate on the attitudes, stereotypes and/or opinions, the others focus on behaviour, “such as workplace practices, intergroup contact, social distance and discrimination” (ibid.).
- Discrimination or situation testing is a kind of experience within which a discriminatory or unfavourable treatment of persons with different characteristics is unmasked in a given situation. “Testing or auditing provides a comparison of the treatment received by equally qualified customers or applicants, and can catch people in the act of discrimination.” (Olli and Olsen 2006, p. 42)
- Qualitative research can be used for gaining a deeper insight into discriminatory practices and structures and “can be seen as a vehicle for obtaining an in-depth understanding of human behaviour, the motives and reasons behind the behaviour, and of the context in which it takes place” (Makkonen 2016, 81). In qualitative research data are collected by case studies, in-depth interviews, ethnography and focus groups.
- Other types of research include media and communication studies, laboratory experiments and research into the justice system.



EXAMPLES OF GOOD PRACTICES



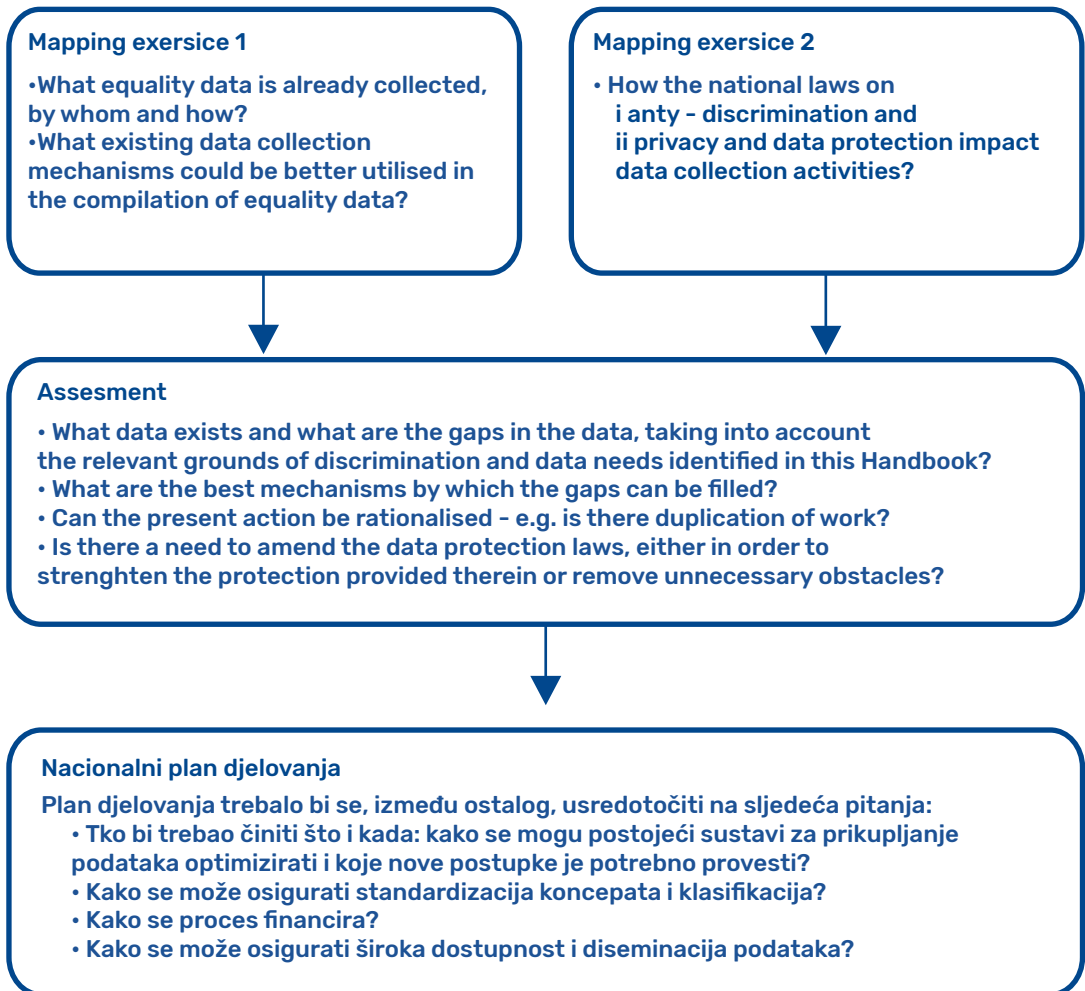
Setting up a data collection system in Finland

The case of Finland is interesting as the administration put great effort in systematically setting up an equality and anti-discrimination monitoring system. The setting up of a data collection system in Finland dates to the mid-1990s, when the Finnish Ministry of Labour created an inter-departmental working group instructed to draft a proposal for a monitoring system on ethnic discrimination. The recommendations drawn up by the working group included, inter alia, several surveys and studies and a systematisation of the police recording practices and were gradually implemented by the Finnish authorities. However, the measures adopted to monitor ethnic discrimination were neither comprehensive nor were they able to capture other grounds of discrimination. Therefore, the Ministry of Labour commenced a new initiative under the heading *Making equality a Reality with Adequate Data* (MERA) comprising the following two tasks: preparing a *European handbook on equality data* and drafting a national proposal for a monitoring system (Mannila and Makkonen 2007a, 100). The latter was developed by a national Working Group set up by the Ministry of Labour and composed of representatives of several Ministries and other Finnish authorities and NGOs.

The Working Group decided to approach this task by dividing it into two steps: Firstly, they agreed on elaborating a *Data Report* containing a description of "all presently available data and comments upon its usefulness, showing where the gaps are" (ibid.) and, secondly, they decided to draft a proposal based on the Data Report summarizing the most important points and suggesting specific recommendations. It proposed the creation of a Reference Group to support the coordination of data collection, monitoring and reporting on discrimination in the Ministry of Labour. The proposal further provided for the division of the data collection system into two parts: "a 'prefixed part' consisting of statistics, complaints data and other information from pre-defined sources, and an 'ad hoc part' addressing the most urgent data needs as defined by the Reference Group for each four-year reporting period" (ibid.). In addition, it suggested the establishment of a National Resource Center on discrimination. The tasks of the Center were supposed to include the compilation of all available data on discrimination and the taking over of the function of an information point.

Besides this actual development of a monitoring system on discrimination in Finland the above mentioned European handbook on equality was written including not only fundamental issues concerning the gathering of equality data, different types of data collection and questions regarding data protection, but also a chapter on developing a national plan of action concerning data collection.

Figure 7
Development of
the national plan of
action (Makkonen
2007a, 98)



The following table taken from the Handbook depicts the most important steps concerning the national plan of action.

Based on these efforts, the Ministry of Interior set up a project for implementing a discrimination monitoring system in 2008 and established a discrimination monitoring group. The monitoring group was a horizontal, cross-sectored

working group of nearly 40 organisations including NGOs, ombudspersons' offices, labour market organisations, public authorities and research institutes. In 2014, the tasks were restructured to the Ministry of Justice and in 2016 the system was restructured, and a task force was established instead of the monitoring group.

The mandate of the monitoring system includes the following tasks:

- To collect data on the situation regarding discrimination in different population groups and to maintain a web page where data on discrimination is collected;¹
- To develop research and statistics on discrimination in cooperation with research institutions and the organisations responsible for keeping statistics;
- To provide information and training for various actors on discrimination situations, the development of discrimination monitoring and to fulfil any information needs arising;
- To provide information for evidence-based policy making;
- To facilitate cooperation among research institutes and other organisations working with discrimination data collection;

The task force was established because the discrimination monitoring group was too big to adequately perform the most important role: the support of the day-to-day decision-making and the coordination of the monitoring system. The task force consists of ten members who are selected on the basis of motivation, expertise and experience. The group meets every two months. Beside this task force a discrimination monitoring network was established based on the previous structures but including additional research institutes and other actors working with discrimination data collection. The network has up to 60 participants and meets once a year to discuss and decide on strategic lines of data collection, to define data gaps and to facilitate cooperation and networking.

To sum up, the monitoring is implemented through a task force and a partnership networks. There is an annual anti-discrimination forum to share and exchange information with all relevant stakeholder. An annual survey on discrimination is carried out; the focus and scope of the survey is

¹ See www.equality.fi

according to a four-year action plan: The first Action Plan from 2010 to 2013 focused on education and recreation (2010), working life (2011), access to justice and security (2012) and social welfare and health services (2013). The second Action Plan from 2014 to 2017 concentrated on education (2014), freedom of speech and the media (2015), access to justice and security (2016) and social welfare and health system (2017). The surveys rely on discrimination indicator areas to structure the gathering of data. The areas are attitudes, experiences of discrimination, hate crime and hate speech, reported case of discrimination and sentences and promotion of non-discrimination.

The setting up of an anti-discrimination monitoring system in Finland is still an evolving and ongoing process. The following points are crucial:

- The developing of a monitoring system relates to the implementation of national and international law concerning human rights and equality. The setting-up of a monitoring system is perceived to be a legal duty to be able to monitor international human rights obligations, in particular obligations in the field of equality and non-discrimination.
- The monitoring system is an inclusive system; a lot of stakeholders were and are involved (including civil society organisations and research institutes) in the process and in different working groups. The different groups are led by the Ministries in a very strong way. The coordination, awareness-raising and cooperation of and between different institutions is as important as the research activities and the collection of data.
- As a comprehensive monitoring is an ambitious task the stakeholders decided to carry out in-depth surveys in specific priority areas laid down in four-year action plans. That allowed the concentration on specific topics and, thus, a thorough and in-depth process that produces reliable and valid research results.
- The monitoring system relies on a broad range of sources of equality data, including official statistics, research and surveys as well as complaints data. The interaction, exchange of information and collaboration of diverse institutions that are collecting different data in the framework of a network is an important part of the process and is actively promoted by the Ministries. In addition, the vast experience and expertise of the different stakeholders of the network are used for enhancing the

quality of the data collection (e.g. defining data gaps, developing indicators, etc.).

- There has to be an adequate provision of resources including personal resources, expertise and financial resources. Adequate personal resources should be dedicated by the public administration. It is important that there is a kind of public ownership. For example, the Finish Ministry of Justice has one assigned public official exclusively committed to promoting and organising the monitoring system. Resources of knowledge are also crucial and, in the Finish example, is guaranteed and further developed by the monitoring network. Furthermore, financial resources dedicated to monitoring activities are crucial. The Finish administration provides 50.000 Euro annually for its monitoring. In addition, EU funds were utilized to prepare and set up the system.
- Scientific quality is guaranteed by involving experts through the monitoring network (see above). This is important in order to develop high quality indicators. The focus on selected areas allows for the development of reliable indicators.

The Equality and Human Rights Commission in Great Britain (ECHR)

The ECHR is Britain's National Human Rights Institution (NHRI) (accredited as A-Status NHRI by the *Global Alliance of National Human Rights Institutions* that is the former *International Coordinating Committee of National Institutions for the Promotion and Protection of Human Rights*). In that capacity, the institution is required to comply with the so-called Paris Principles that govern the status and functioning of independent national human rights institutions. Among the most important tasks of NHRIs is giving advice to public institutions, monitoring the human rights situation and provide evaluation of policies and their impact on human rights and do research on human rights. Data collection is therefore a central task of the ECHR. In its long history, the ECHR has gained vast experience concerning equality data collection in general and in collecting data on ethnic origin in particular.

The ECHR was founded in October 2007 by merging three institutions: The Equal Opportunities Commission (EOC), the Disability Rights Commission (DRC) and the Commission for Racial Equality (CRE). The EOC was entrusted with tackling discrimination on grounds of gender, the DRC focused on combating discrimination based on disability and the CRE focussed on issues concerning discrimination on grounds of ethnicity and racism. Concerning the latter, it is

striking that Great Britain has quite a long history regarding recognising and combating racial inequality starting with the first Race Relations Act in 1965. Since then the scope and extent of race equality legislation and policies has been continually expanded (Vassilopoulou 2009, 37-41). In 1976, an amendment of the Race Relations Act set up the Commission for Racial Equality (CRE) "to mediate between the requirements of the law and its addressees and to ensure the effectiveness of the legal framework by developing the necessary non-statutory tools" (Stavo-Debaugé 2005, 44). Since then the CRE has launched ethnic monitoring as crucial tool to highlight possible inequalities, investigate their underlying causes and remove any unfairness or disadvantage defining it as "a process you use to collect, store, and analyse data about people's ethnic backgrounds" (Commission for Racial Equality 2007, 3). The Commission has published several guidelines regarding the monitoring of equal opportunities and ethnic origin including the manuals "Monitoring an equal opportunity policy: a guide for employers" in 1978, "Ethnic monitoring in schools" in 1992 and "Ethnic Monitoring. A guide for public authorities" in 2007 (Vassilopoulou 2009, 37-41). In 2000, public and political debate on institutional racism within London's police force triggered the Amendment of the Race Relations Act 1976 to provide the legal basis for ethnic monitoring. Therefore, ethnic monitoring became obligatory for public bodies. Because of the merger of the various commissions into the Equality and Human Rights Commission, monitoring has been extended to cover the whole range of grounds and fields laid down by the anti-discrimination legislation.

In February 2006, the Equality Minister and Minister for the Cabinet Office established a Review Panel in order to work out an Equalities Review. The Panel launched a process to gain insight into the long term and underlying causes of disadvantages that need to be addressed by public policy and to make practical recommendations on key policy priorities. A further aim was to "inform both the modernisation of equality legislation, towards a Single Equality Act; and the development of the new Commission for Equality and Human Rights" (The Equalities Review 2007, 13). In doing so the Panel issued a call for evidence about the progress achieved over the past 60 years to reduce inequalities and about the most persistent and stubborn inequalities. Furthermore, it commissioned a number of research reports about, e.g. defining and

measuring equality or equality, diversity and prejudice in Britain, and organised a series of seminars and stakeholder discussions in order to set policy priorities. The Final Report of the Equalities Review lays down ten dimensions of equality as “a comprehensive and consistent basis for government and wider society to move towards a fairer, more equal society” (ibid., 17).

- “Longevity, including avoiding premature mortality.
- Physical security, including freedom from violence and physical and sexual abuse.
- Health, including both well-being and access to high quality healthcare.
- Education, including both being able to be creative, to acquire skills and qualifications and having access to training and life-long learning.
- Standard of living, including being able to live with independence and security; and covering nutrition, clothing, housing, warmth, utilities, social services and transport.
- Productive and valued activities, such as access to employment, a positive experience in the workplace, work/life balance, and being able to care for others.
- Individual, family and social life, including self-development, having independence and equality in relationships and marriage.
- Participation, influence and voice, including participation in decision-making and democratic life.
- Identity, expression and self-respect, including freedom of belief and religion.
- Legal security, including equality and non-discrimination before the law and equal treatment within the criminal justice system.” (ibid., 18)

Covering these ten dimensions the Final Report of the Equalities Review recommends the development of a comprehensive framework for measuring progress towards equality. The framework should be flexible in a way that it is “used by all public bodies, to agree priorities, set targets and evaluate progress towards equality, and the framework is used by the EHRC, to inform its triennial State of the Nation report” (ibid., 110). The collection of data is seen as an important precondition in order to make good use of the framework. Therefore, the Review recommends the following measures (ibid., 111):

- A comprehensive government review of current data needs led by the Office for National Statistics,
- Government, public bodies and the private sector need to make better use of that data,
- Increasing transparency by publishing data and analysis in such a way that they can be readily understood,
- The publication of more information about the performance on equality of organisations in all sectors,
- The setting out of a required standard format for this reporting by the EHRC.

Moreover, the Review contains an Annex on Data stressing the inability to present a complete picture of inequality due to a lack of data and laying down the data needs for the above-mentioned framework. In detail, this Annex emphasises the following issues (*ibid.*, 139-145):

- Systemic issues
 - Data gaps in many key areas such as data on education and socio-economic status, data on healthcare or data on understanding attitudes and prejudice,
 - Lack of trend data and time inconsistencies in measurement,
 - The need of better local data to be able to respond in timely fashion and more effectively to demographic and social change,
 - Dispersed data collection and poor information sharing,
 - Poor practice in data publication and dissemination.
- Data quality
 - Better information on appropriate data categorisation,
 - Reduce the use of proxy measures,
 - Better monitoring of data collection,
 - Improve response rates,
 - Improve publication formats and data accessibility.
- The framework for measurement covering the ten dimensions mentioned above should specify “the need for a monitoring system based on spotlight indicators highlighting important aspects of equality for each dimension” (*ibid.*, 145). The indicators rely on the use of data collected by means of surveys or administrative systems but also on qualitative data.
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highlighting important aspects of equality for each dimension” (ibid., 145). The indicators rely on the use of data collected by means of surveys or administrative systems but also on qualitative data.

1. The EHRC commissioned several studies amongst others a review of equality statistics carried out by Sylvia Walby, Jo Armstrong and Les Humphreys of the Lancaster University (2008) which later served as a basis for the development of indicators.

2. Selecting indicators:

a) Drawing up a set of criteria with which to select indicators (the selection criteria are listed in Alkire et al 2009, 25-34).

b) Developing a long list and provisional short list of indicators (based on a list of the Office for National Statistics (2007) and the review of equality statistics (Walby, Armstrong and Humphreys 2008) among other sources).

c) First round of consultation with subject specialists and stakeholders.

d) Revision of short list of indicators and second round of consultation.

e) Detailed technical assessment and production of a final list of indicators.

3. Defining next steps of the procedure i.e. collecting and analysing data in relation to the indicators or the development of indicators in other or specialised areas.

In total, a measurement framework based covering fields was developed. The following reports spell out the specific domains and areas developed either for the monitoring of equality in general or in specific fields:

- As mentioned above, the equality measurement framework that presents a measurement framework that can be deployed to assess equality and human rights across a range of domains including life, health, physical security, legal security, education and learning, standard of living, productive and valued activities, individual, family and social life, identity, expression and self-respect and participation, influence and voice.²

- A specific set of indicators developed for children and

² For a detailed description please consult <https://www.equalityhumanrights.com/en/equality-measurement-framework> (19 June 2017).

young people that takes into consideration specific needs of children and adolescents.

- A good relationship framework that presents indicators on good relations between different groups.³
- The Human Rights Measurement Framework that presents information on analysing and assessing the human rights situation in Britain.⁴

Regarding indicators and sources there are certain quality standards to fulfil (see figure 8): Indicators must be relevant, specific, flexible, measurable, timeless or as closest as possible (proxy indicators). Qualitative sources must be referenced/verifiable, the methodology/limitations must be clearly presented, findings must be robust, author must be objective and anecdotal stories should be rejected. Quantitative sources should come from official or curated statistics, data must be accessible, changes over time analysis must be possible, there should be a continuity of data and fulfil criteria of geographical coverage and data must be disaggregated by groups (see figure 8).

Based on the equality indicators set out in the Equality Measurement Framework but adding some additional human rights indicator, the ECHR published the report “Is Britain Fairer” in 2015. The publication reports on equality and human rights issues presenting evidence on structure, process and outcome. The data on structure refers to the legal commitments in the field of human rights, the process data contains information on the efforts taken by the state to meet its obligations and the outcome data presents findings on the actual positions and experiences of individuals and groups (see ECHR 2015). There are detailed information available on the context, technical issues and methodology of the report as well as on the selected domains and indicators used⁵. For an overview on domains and indicators please see Figure 9 and 10.

To sum up, the ECHR has set up a very comprehensive and elaborate monitoring system that considers the collection of data as a crucial and challenging task. The following points are important:

³ For the three reports in this field see <https://www.equalityhumanrights.com/en/our-measurement-framework/childrens-measurement-framework> (19 June 2017).

⁴ See <https://www.equalityhumanrights.com/en/publication-download/research-report-60-good-relations-measurement-framework> (19 June 2017).

⁵ Vidi <https://www.equalityhumanrights.com/en/britain-fairer-report/supporting-evidence> (19. lipanj 2017).

Figure 8
Good indicators and sources of evidence,
Table taken from
http://ennhri.org/IMG/pdf/session_3_hr_monitoring_and_measuring_impact_ppt_.pdf

What is a good indicator?

- Relevant
- Specific
- Flexible
- Measurable
- Timeless
- The best you can get (“proxy”)

What is a good qualitative source?

- Source must be referenced/verifiable
- Methodology/limitations must be clearly presented
- Findings must be robust
- Author must be objective
- No anecdotal stories

What is a good quantitative source?

- Official/curated statistics (e.g. national surveys)
- Data is accessible
- Change over time analysis possible
- Continuity
- Geographical coverage
- Data can be disaggregated by groups

• To set up a monitoring including a data collection system, the administration (the relevant Ministries) initiated a review process of data already collected, data gaps and other relevant issues (methodological and theoretical issue) by commissioning various studies on these topics. Thus, it included various experts from the academia in order to collect high quality knowledge and map the status quo of equality and other data relevant for the monitoring process. Based on these papers recommendations were drafted, fields on data collection were defined and indicators developed.

• The process provided for the inclusion of many stakeholders, representatives of many different administrative units as well as the scientific community. By involving the scientific community, it was assured that methodological and theoretical questions were adequately taken into consideration and the data collection system was based on a sound scientific foundation.

• The monitoring system was developed during a longer process that means that new developments and insights could be taken into consideration including the development of more and new indicators in different fields.

• The monitoring system mainly uses quantitative data, especially for outcome indicators. The Research report

Life	Health	Physical security	Legal security	Education
<ul style="list-style-type: none"> • Non natural deaths of people resident or detained in public private institutions • Homicide • Suicide 	<ul style="list-style-type: none"> • Life expectancy • Infant mortality • Health status • Mental health • Healthy lifestyles (smoking, alcohol consumption, overweight and obesity) • Access to healthcare for marginalised groups • Equality and human rights issues in palliative and end of life care • Dignity and respect in health and social care 	<ul style="list-style-type: none"> • Conditions for people resident or detained in public or private institutions including use of force and restraint • Violent crime • Fear of crime • Sexual and domestic violence • Hate crime (self reported experiences of victims) 	<ul style="list-style-type: none"> • Offences reported and brought to justice • Equal treatment by the police and criminal justice system • Equal and effective treatment and support for individuals with civil justice problems • Detention • Appropriate justice for children and young people • Special prosecutions 	<ul style="list-style-type: none"> • Access to education and educational attainment for children and young people • Exclusion from education for children and young people • Safety, security and emotional health at school • Access to further education lifelong learning

Figure 9 Domains and indicators (1), Table taken from http://ennhri.org/IMG/pdf/session_3_hr_monitoring_and_measuring_impact_ppt.pdf

Standard of living	Productive and valued activities	Individual, family and social life	Identity, expression and self - respect	Participation, influence and voice
<ul style="list-style-type: none"> • Adequate housing • Poverty and income • Access to care • Quality of the local area 	<ul style="list-style-type: none"> • Trafficking and exploitation • Employment • Occupation • Earnings 	<ul style="list-style-type: none"> • Availability of support • Freedom from domestic abuse (emotional and financial) • Being free to form and maintain relationships of own choosing • Respect for private life: information privacy and surveillance 	<ul style="list-style-type: none"> • Freedom to practise religion or belief • Ability to communicate in the language of your choosing • Freedom from stigma and stereotyping 	<ul style="list-style-type: none"> • Formal political participation • Political activity, including the right to protest • Taking part in civil organisation

Figure 10 Domains and indicators (2), Table taken from http://ennhri.org/IMG/pdf/session_3_hr_monitoring_and_measuring_impact_ppt.pdf

on the EMF remarks that “[s]tatistical indicators are useful because they allow an assessment of how major inequalities are changing over time but they are only one of several ways to monitor inequality. Inequalities experienced by small minorities (such as the transgender community) are not well tracked in standard survey data. In addition, there may be particularly egregious and/or legally significant instances of inequality and denial of human rights in individual cases (for examples, forced labour) that it is important to monitor and report on, and which are also not adequately captured by statistical indicators. The statistical indicators in the EMF will therefore need to be supplemented with other forms of monitoring.” (Alkire et al 2009, 8) But there are also qualitative data sources. As mentioned above, the details on the sources and methodology are laid down in specific papers and can be assessed on the website ⁶. That also means, that data collection and its methods, approaches and theoretical considerations are communicated in a very transparent manner. Interested citizens and stakeholders can review the data sources, the reasons for choosing certain indicators and the development of the process.

The Vienna Integration and Diversity Monitoring was introduced in 2008 in order to monitor the impact of immigration on several social and policy areas of the City of Vienna by using a broad range of indicators and benchmarks and drawing from administrative data collection systems as well as surveys. On basis of this monitoring processes an Integration and Diversity Monitor is published presenting the changes, the status quo and the challenges the City of Vienna has to face with regard to integration and diversity. Thus, the objective of the City of Vienna’s monitoring is “to make change processes visible as they unfold. It allows us to give statements and assessments on legal, social and economic developments, as well as on the adequacy and effectiveness of political and administrative responses to these.” (Stadt Wien 2014b, 2) The City of Vienna has extended its monitoring efforts by also developing a monitoring tool in the field of gender equality. In 2013, the City published a Vienna Gender Equality Monitoring Report that aims at monitoring the status of gender equality in 12 areas

⁶ See <https://www.equalityhumanrights.com/en/britain-fairer-report/supporting-evidence> (19 June 2017).

The Vienna Integration and Diversity Monitoring

(see Stadt Wien 2013a and 2013b). However, this chapter will focus on the Integration and Diversity Monitoring.

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The monitoring process is, thus, based on the two pillars: an integration monitoring and a diversity monitoring:

- The integration monitor tries "to assess whether a person's immigration or their parents' migration has an impact on that person's social standing, their participation in education, work mobility, risk of becoming unemployed, their health, choice of housing, social and political participation and whether a monitoring system based on indicators can identify and illustrate these aspects." (Stadt Wien 2014b, 3) Thus, integration monitoring aims at continuously observe and assess specific areas of integration. "Selected indicators describe the (social) status quo of the Viennese society from an integration policy point of view." (Stadt Wien 2009, 4) The monitor serves as a basis for future strategic political and administrative developments of the City of Vienna.
- Diversity monitoring "analysis the status quo of diversity measures that have been implemented by the City of Vienna. It evaluates the achievements of public administration in human resource development and the adaptation of its services based on the results of integration monitoring with regard to political aims and the social need for action. Diversity monitoring also

shows the future need for action in this area.” (Stadt Wien 2009b, 4)

So far, the City of Vienna has published three reports that present the result of its integration and diversity monitoring:

- The first report *Monitoring Integration Diversität Wien* was published in 2009 (Stadt Wien 2009a). The City of Vienna describes the first monitor as an ambitious project which served as a starting point for refinement and further development of methods and indicators for the subsequent monitors.

The first integration monitor covered the areas of

- Demography – basic information
- Immigration, integration & legal status
- Education
- Employment & labour market
- Income & social protection
- Housing
- Healthcare
- Social & political participation,
- Social climate, living together & safety and security.

The diversity monitor of the first report was focusing on the following areas:

- Strategy “City of Diversity”
- Education, young people & women
- Employment & entrepreneurship
- Housing & living together
- Healthcare & social issues
- Infrastructure & services
- Culture & leisure

Thus, the integration monitor aims at providing information on the status quo of integration and the diversification of the population as a result of growing immigration and the diversity monitor introduces “the activities of the City of Vienna in its own sphere of competence, thus presenting a comprehensive overview of the development of integration-oriented diversity policies.” (Stadt Wien 2009b, 6)

- The second report *Monitoring Integration Diversität Wien 2009-2011* was published in 2012 (Stadt Wien 2012a). The report merges the two dimensions of integration and diversity which were dealt rather separately in the first report. Thus, the second report distinguishes between nine topics in both areas:

- Equality & participation
- Education, further education & training
- Employment & labour market
- Income & social security
- Healthcare & care of the elderly
- Housing
- Infrastructure,
- Culture & leisure
- Public space, neighbourly living & social climate

The second monitoring period covers a broad range of indicators, including in particular structural indicators, indicates changes with regard to the first monitoring report, analysis reasons for changes as well as continuities and is based on an improved and extended set of variables allowing also for multivariate analysis (see Stadt Wien 2012a, 25).

- The report *3. Wiener Integrations- & Diversitätsmonitor* (Stadt Wien 2014a) was published in 2014 and focuses on eight subject areas that are relevant for integration and diversity. The areas are mainly congruent with the areas of the second report, however, not covering the area of culture and leisure and the last area was renamed into Public space, coexistence & social climate. Again, the report highlights changes with regard to the first and second report as well as previous time periods in case data was available. (see Stadt Wien 2014a, 54)

Sources of data collection

The City of Vienna relies on several sources of data collection for its integration and diversity monitoring. Amongst others, the following sources are used for the monitor (Stadt Wien 2009a, 2012a and 2014a):

- Administrative registers collected by Statistics Austria, the Austrian Central Statistics Office that is created and mandated by the Austrian Federal Statistics Act. Statistics Austria is the Austrian office responsible for demographic, migration and educational statistics. The demographic register distinguishes between country of birth and nationality, but not the country of birth of the parents.
- Register data collected by the City of Vienna such as the register on the electorate.
- Microcensus including a labour force survey is a quarterly survey based on a household sample that polls 5000 Persons in Vienna carried out by Statistics Austria. The

microcensus distinguishes between country of birth, nationality and country of birth of parents.

- EU-SILC is an annual statistics on income and living conditions of private households in Europe. It is the only data source that collects data source on the income of private households in Austria.

- The Labour Market Data Base includes data provided by the Federation of Austrian Social Insurance Institutions and the Public Employment Service Austria. The Labour Market Data Base contains information only on citizenship.

- Other sources of data such as surveys commissioned by the City of Vienna with the focus on specific topics. For example, the Social Sciences Basic Survey (Sozialwissenschaftliche Grundlagenforschung) with the title Vienna Quality of Life Survey (Wiener Lebensqualitätsstudien) is a survey carried out by the City of Vienna and the University of Vienna in 2008 and focusses on the quality of life in Vienna. The survey collects data on country of birth, nationality and the countries of origin of the parents. The survey was carried out again in 2013 and had the title Quality of Live in Vienna in the 21st Century (Lebensqualität in Wien im 21. Jahrhundert).

- The Diversity monitor is based on data provided by a survey carried out in the course of the monitoring. The survey includes different offices of the City of Vienna administration and is based on semi-structured interviews as well as on focus groups and workshops. Since 2009, the data collection has been carried out by an online survey that collected qualitative as well as quantitative data (see Stadt Wien 2012a, 35 and 20014a, 15).

In conclusion, it is important to point out the following crucial issues concerning the data collection in the context of the Vienna Integration and Diversity Monitoring:

- The development of the Vienna Integration and Diversity Monitoring was supported by a scientific working group that drafted a concept for the development of the monitoring and spelled out basic definitions, concepts and components of the Monitor. The working group consisted of representatives of several municipal authorities of the City of Vienna and experts from different academic institutes as well as think tanks. Thus, the monitor was developed with the support of scientific experts and,

in doing so, the scientific quality of the data collection system has been ensured.

- The monitor was developed during a process that started from the analysis of the status quo, followed by the definition of priorities, the areas of activity, the objectives and the target groups of the monitoring. Based on this preceding work, the indicators were developed. Subsequently, the data was calculated, analysed and interpreted and the report was drafted followed by an evaluation and a further development of the monitoring and data system. Thus, the process was responsive to refinements and further developments concerning concepts, methodology, indicators or data sources.

- The integration and diversity monitor relies on several data sources, official statistics as well as research data commissioned by the City of Vienna or other public institutions and carried out by University and other research institutes

- It has to be stressed that authorities of Vienna, in particular the Municipal Department 17 (Integration and Diversity) has a strong ownership of the project. There are people employed for the setting up and further development of the monitor that organise and coordinate the process and are responsible for the whole monitor cycle.

- Besides the MA 17, a multitude of Municipal Authorities of the Cities of Vienna were and are involved in the monitoring. This required awareness raising and the provision of knowledge and information for the bodies involved. In order to achieve a common understanding and raise awareness workshops were held with involved stakeholders.

Conclusions

Setting up a monitoring and data collection system is a challenging task. Looking at the good practice examples presented above, there are some points of importance that are observable across all three examples. In conclusions, these points will be presented as they constitute important challenges and vital points when it comes to establishing a good and reliable system of collecting equality data.

- In all three cases the setting up of a monitoring and data collection system was an inclusive process, involving not only representatives from public bodies but also stakeholders and experts from various interest groups and academic institutes. That ensures that different

expertise and perspectives are included in the process. However, it also requires considerable cooperation and organisation efforts as well as raising awareness among different stakeholders on the importance of the topic. Important in this process are specific discussion and information exchange for such as working groups, networks or workshops that discuss relevant issues of the process, define concepts, processes and important steps as well as serve as information gathering of relevant expertise.

Figure 11
Graph taken MA 17
(2008, 6) (Translated
by MM)



- A strong ownership and leadership by public bodies seems to be vital in the process. In the cases presented above this was demonstrated by dedicating resources and personnel responsible for initiating and advancing the process.

- All three examples had a focus on ensuring and guaranteeing the scientific quality of data collection. It is important for all three cases to constantly improve the scientific quality including concepts, categories and indicators used and to apply scientific rigour and use relevant scientific methodology. In all three cases advancing methods and scientific quality is an ongoing process. All three examples rely on external and independent scientific experts to ensure and enhance the data collection.

- In all three cases the process started with a review process of existing data and the assessment of their quality and usability for the monitoring process. The process was also dedicated to defining lack of and gaps in the existing data.

- All three examples rely on a strong review process that means the evaluation of the data collection is part of the process and the results are fed back into the process.

- The monitoring system of all three cases rely on different data sources. Good and reliable administrative data, however, seems to be a crucial part of any monitoring process. It also seems to be a proven strategy to focus on specific topics or fields of data collection first and then gradually broaden the process.



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