



Monitoring the functioning of the equality bodies

WORKING DOCUMENT

TO DISCUSS POSSIBLE INDICATORS ON STRUCTURE, INDEPENDENT FUNCTIONING AND RESOURCES

(to be discussed at the meeting of the expert group of 3-4 October 2024)

LEGAL BASE

Article 18 of Directives 2024/1499¹ and 2024/1500² (thereafter “the Directives”) on monitoring and reporting provides that:

“1. By 19 June 2026, the Commission shall, by means of an implementing act, establish a list of common indicators on the functioning of the equality bodies designated under this Directive. When preparing the indicators, the Commission may seek advice from the European Union Agency for Fundamental Rights, the European Institute for Gender Equality and from networks of equality bodies at Union level. The indicators shall cover the human, technical and financial resources, independent functioning, accessibility and effectiveness of equality bodies, as well as developments in their mandate, powers or structure, ensuring the comparability, objectivity and reliability of the data collected at national level. The indicators shall not be for the purpose of ranking or of issuing specific recommendations to individual Member States.

The implementing act shall be adopted in accordance with the examination procedure referred to in Article 22(2).

2. By 19 June 2031, and every 5 years thereafter, Member States shall provide the Commission with all relevant information regarding the application of this Directive. Such information shall include at least data on the functioning of equality bodies and shall take into account the reports drawn up by the equality bodies under Article 17, points (b) and (c).”

Article 16(1) of the Directives on “Data collection and access to equality data” stipulates that:

“The data collected by equality bodies shall be disaggregated [...] in accordance with the indicators referred to in Article 18 of this Directive. Any personal data collected shall be anonymised or, where that is not possible, pseudonymised.”

Recital 46 of Directive 2024/1499 and Recital 45 of Directive 2024/1500 provide that

“In order to ensure uniform conditions for the implementation of Member States’ reporting obligations as regards the functioning of equality bodies designated under this Directive, implementing powers should be conferred on the Commission to establish a list of relevant indicators,

¹ [Directive - EU - 2024/1499 - EN - EUR-Lex \(europa.eu\)](#)

² [Directive - 2024/1500 - EN - EUR-Lex \(europa.eu\)](#)



on the basis of which data should be collected. Such indicators should not be for the purpose of ranking or of issuing specific recommendations addressed to individual Member States. Those powers should be exercised in accordance with Regulation (EU) No 182/2011 of the European Parliament and of the Council”.

Besides those provisions, Article 17 of the Directives on Reports and strategic planning also provides that *“Member States shall ensure that equality bodies...(b) produce and make available to the public an annual activity report, including their annual budget, staff and financial reporting”.*

DEFINITION AND CRITERIA for the development of indicators³

An indicator is a summary measure related to a key issue, against which data is collected in a standardized format.

The Directives stress the need to ensure the comparability, objectivity and reliability of the data collected at national level. Indicators must be relevant, specific and objective. Data must be measurable in a sufficiently comparable way across Member States/equality bodies. Methods of data collection and calculation must be transparent.

Each indicator will be accompanied by the following information:

- A. **Number and name:** the indicator’s name recalls its underlying dimension. Each indicator has a unique identification number. Supporting data are also numbered and linked to the relevant indicator.
- B. **Dimension/scope:** links the indicator with the category/ies listed in Article 18
- C. **Objective:** presents the standards being monitored by the indicator
- D. **Definition:** explains the meaning of the indicator and defines specific terms
- E. **Rationale:** explains how the indicator and the data used for its calculation will contribute to the monitoring of/reporting on the standards from the Directives.
- F. **Data collection and source:** will be filled by the national authority to specify who has collected the data and how the data was collected.
- G. **Year of information:** year of the collected data
- H. **Comments and limitations:** when relevant, explains how to fill the data to overcome possible issues and facilitate comparability.
- I. **Data:** refers to the data necessary to fill the indicator. It is presented in the form of closed questions and tables providing information.

Where necessary, metadata questions⁴ will help Member States clarify their answers.

³ Atkinson T., Cantillion, B., Marlier, E. and Nolan, B. (2002), [Social indicators: The EU and social inclusion](#), Oxford, Oxford University Press.

⁴ Metadata is data that provides information about other data.



PROCEDURE FOR DATA COLLECTION

Member States will provide the necessary data to the Commission via an online survey tool, by 19 June 2031 and every 5 years thereafter. The Commission will receive one single document per Member State, compiled by the Member States' authorities, containing both data disaggregated by equality body and aggregated data.

Some of the collected data could also be used by Equality bodies to produce the annual activity reports of Article 17(b) of the Directives which should include the annual budget, staff and finances of equality bodies.

Preliminary working draft of POSSIBLE INDICATORS

OVERALL STRUCTURE' [OS]

A. Number and Name: OS1

OS1. Please indicate which bodies are required to fulfil the minimum standards in your Member State and how they are set up.

B. Dimension/scope: Structure and powers

C. Objective: Mapping the bodies which exercise some of the powers laid down in the Directives and reporting on the overall structure of equality bodies.

D. Definition: "Other competent bodies" refers to the competent bodies other than equality bodies which have either alternative dispute resolution or powers of inquiry within the meaning and scope of Articles 7 and 8 of the Directives. Multi-mandate bodies are to be understood as bodies in which the equality mandate is exercised alongside other mandates (e.g. Ombudsperson, National Human Rights Institution, Monitoring body under the UNCRPD).

E. Rationale/ description of the indicator: The indicator will help identify, in each Member State, the equality bodies - including any regional or local self-standing bodies - and the other entrusted "competent bodies" exercising some powers laid down in the Directives. It will also indicate whether the equality body is self-standing, or if it is part of a multi-mandate body, and if it is managed by a governing board.

F. Data collection and source: *to be filled by the national authorities*

G. Year of information: The indicator should describe the situation at the time of the relevant reporting exercise.

H. Comments and limitations:

I. Data. Data necessary to fill the indicator.



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OS1_1	<p>Please list all equality bodies in your country with powers laid down in the Directives. For each listed body please indicate (1) if it is a multi-mandate body (Yes/No), (2) whether it has a governing board, (3) the number of its regional and local branches, if applicable; and (4) the total number of offices for the whole territory of the country. If not applicable (no regional/local offices), insert 0.</p> <p><i>NOTE: Please list in column 'Equality Bodies in Country' all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives should be listed separately.</i></p>				
	Equality Bodies in [Country]	Is this a multi-mandate body? Yes/No	Is there a governing board? Yes/No	Number of local offices	Total number of offices for the whole territory of the country
1	[Equality Body Name]				
2	[Equality Body Name]				
3	[Equality Body Name]				
4	[Equality Body Name]				

OS1_2	<p>Please list all entrusted “other competent bodies” in your country with powers laid down in the Directives, e.g. alternative dispute resolutions or inquiries. For each body, please specify which of the competences listed they are entrusted with (Yes/No).</p>				
	Other competent bodies in [Country]	Competences			
		Alternative dispute resolution	Inquiries	Other, please specify	Other, please specify
1	[Body Name]	yes	yes	Text	text
2	[Body Name]				
3	[Body Name]				



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OS1_3	For each equality/competent body, please indicate its competencies/powers (Yes /No) NOTE: Please list all bodies that are different entities and designated as equality bodies or competent bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives, should be listed separately.					
			1	2	3	4
			[Equality Body Name]	[Equality Body Name]	[Equality Body Name]	[Competent Body Name]
OS1_3_A Prevention and Promotion	OS1_3_1_1	Prevention of discrimination				
	OS1_3_1_2	Promotion of equal treatment				
OS1_3_B Assistance to victims	OS1_3_2_1	Ability to receive and handle complaints				
	OS1_3_2_2	Alternative dispute resolution				
	OS1_3_2_3	Inquiries				
	OS1_3_2_4	Issuing opinions				
	OS1_3_2_5	Issuing decisions				
	OS1_3_2_6	Litigation				

OS1_TEXT Please describe any challenges faced while answering the questions in this part of the questionnaire, in particular those related to the particular situation in your Member State [text box]

A. Number and Name: OS2

OS2. Does/do the mandate(s) of the equality bodies in your Member State collectively cover all discrimination grounds and all the fields included in Directives 79/7/EEC, 2000/43/EC, 2000/78/EC, 2004/113/EC, 2006/54/EC and 2010/41/EU?

B. Dimension/scope: Mandate (grounds and fields)

C. Objective: Map the competences and tasks introduced by the Directives in relation to all the grounds and all the fields as included in Directives 79/7/EEC, 2000/43/EC, 2000/78/EC, 2004/113/EC, 2006/54/EC and 2010/41/EU in each Member State

D. Definition: The “mandate” of an equality body is understood to refer to the grounds of discrimination and fields it covers⁵.

⁵ Field: fields covered by the EU Equality Directives: (a) conditions for access to employment, to self-employment and to occupation, including selection criteria and recruitment conditions, whatever the branch of activity and at all levels of the professional hierarchy, including promotion; (b) access to all types and to all levels of vocational guidance, vocational training, advanced vocational training and retraining, including practical work experience; (c) employment and working



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- E. Rationale:** The indicator will help identify whether, in each Member State, all the grounds and fields included in Directives 79/7/EEC, 2000/43/EC, 2000/78/EC, 2004/113/EC, 2006/54/EC and 2010/41/EU are covered as required by Article 1(2) of the Directives, notwithstanding the possible designation of different equality bodies with different mandates.
- F. Data collection and source:** *to be filled by the national authorities*
- G. Year of information:** The indicator should describe the situation at the time of the relevant reporting exercise.
- H. Comments and limitations:** Under EU law, not all the grounds have to be covered for all the fields. Replies should only cover EU law requirements. An optional answer field has been added to ask if intersectional discrimination is covered.
- I. Data.** Data necessary to fill the indicator.

OS2. For each equality/competent body, please specify the grounds and fields it covers (Yes/No)								
NOTE: Please list all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives should be listed separately.								
[Equality body name]		employment and occupation	education	access to goods and services available to the public	housing	social protection	social advantages	social security
1	Sex	Yes		Yes	Yes	Yes	Yes	Yes
2	Racial or ethnic origin							
3	Disability							
4	Age							
5	Religion or belief							
6	Sexual orientation							
7	Intersectional discrimination	YES/NO						
[Competent body name]								
1	Sex							
2	Racial or ethnic origin							
3	Disability							
4	Age							
5	Religion or belief							
6	Sexual orientation							
7	Intersectional discrimination	YES/NO						

conditions, including dismissals and pay; (d) membership of and involvement in an organisation of workers or employers, or any organisation whose members carry on a particular profession, including the benefits provided for by such organisations; (e) social protection, including social security and healthcare; (f) social advantages; (g) education; (h) access to and supply of goods and services which are available to the public, including housing.

Ground: grounds listed in Article 19 of the Treaty on the Functioning of the EU ('TFEU') and in the Equality Directives: sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation.



OS2_TEXT

Please describe any challenges faced while answering the questions in this part of the questionnaire, in particular those related to the particular situation in your Member State [text box]

'OVERALL STRUCTURE' [OS]

A. Number and Name: OS3

OS3. Are there appropriate mechanisms in place enabling equality bodies (and other competent bodies where applicable) to cooperate with each other, and with other public and private entities within your Member State?

- B. Dimension/scope:** Structure and effectiveness [*N.B. To be confirmed after the discussion on effectiveness*]
- C. Objective:** Reporting on the mechanisms in place to allow equality bodies and other competent bodies where applicable, to cooperate, within their respective fields of competence, with each other and with other public and private entities, within the same Member State.
- D. Definition:** “appropriate mechanisms” require established formal processes (informal contacts are not enough), which can take many forms depending on the national set-up. They must facilitate “cooperation” which refers to the action or process of working together to the same end. Those cooperation mechanisms could take the form of regular formal meetings, memorandum of understanding, information/data sharing agreements, etc.
- E. Rationale:** The indicator will monitor whether equality bodies cooperate, within their respective fields of competence, with each other and with other public and private entities within the same Member State, as required by Article 14 of the Directives. Cooperation between equality bodies, on the one side, and other competent bodies, on the other side, is also covered, where applicable, in accordance with Article 14, Article 7 and Article 8(3) of the Directives.
- F. Data collection and source:** *to be filled by national authorities*
- G. Year of information:** The indicator should describe the situation at the time of the relevant reporting exercise.
- H. Comments and limitations:**
- I. Data necessary to fill the indicator:**

OS3	
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For each equality/competent body, please indicate (Yes /No) whether: (1) it cooperates with other actors, and (2) in what form, as listed.					
NOTE: Appropriate mechanisms are defined as 'formalised forms of cooperation, enabling equality bodies (and other competent bodies where applicable) to cooperate with each other, and with other public and private entities.'					
	Forms of cooperation	1	2	3	4
	Cooperation actors	[Equality Body Name]	[Equality Body Name]	[Equality Body Name]	[Competent Body Name]
OS3_A	Other equality bodies				
OS3_A1	Formalised agreement				
OS3_A2	Data sharing agreement				
OS3_A3	Formalised meetings				
OS3_A4	Other [Please specify]				
OS3_A5	Other [Please specify]				
OS3_B	Social partners				
OS3_B1	Formalised agreement				
OS3_B2	Data sharing agreement				
OS3_B3	Formalised meetings				
OS3_B4	Other [Please specify]				
OS3_B5	Other [Please specify]				
OS3_C	Labour inspectorates				
OS3_C1	Formalised agreement				
OS3_C2	Data sharing agreement				
OS3_C3	Formalised meetings				
OS3_C4	Other [Please specify]				
OS3_C5	Other [Please specify]				
OS3_D	Civil society				



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OS3_D1	Formalised agreement				
OS3_D2	Data sharing agreement				
OS3_D3	Formalised meetings				
OS3_D4	Other [Please specify]				
OS3_D5	Other [Please specify]				
OS3_E	[Other, please specify]				
OS3_E1	Formalised agreement				
OS3_E2	Data sharing agreement				
OS3_E3	Formalised meetings				
OS3_E4	Other [Please specify]				
OS3_E5	Other [Please specify]				
OS3_F	[Other, please specify]				
OS3_F1	Formalised agreement				
OS3_F2	Data sharing agreement				
OS3_F3	Formalised meetings				
OS3_F4	Other [Please specify]				
OS3_F5	Other [Please specify]				

OS3_TEXT Please describe any challenges faced while answering the questions in this part of the questionnaire, in particular those related to the particular situation in your Member State [text box]

'INDEPENDENT FUNCTIONING' (IF)

A. Number and Name: IF1 (to be completed)



IF1. Does each equality body (and other competent bodies where applicable) have the ability to perform its tasks and exercise its competences without seeking or taking instructions from anybody - legal framework/de jure-?

B. Dimension/scope: Independent functioning

C. Objective: Reporting on the independence of equality bodies (competent bodies where relevant), by looking at whether they are free from external influence (from a legal perspective)

D. Definition: The Recitals (Recital 18 of Directive 2024/1499 and Recital 17 of Directive 2024/1500) refer to the performance of the equality bodies' tasks independently from "political, financial, religious, or any other influence". It therefore clarifies the type of instructions that equality bodies/competent bodies may receive. The fact that equality bodies cannot seek or take instructions from anybody does not prevent them from gathering the views of public and private entities, but they should not be bound by them.

E. Rationale: By seeking or taking instructions, an equality body would be subject to "external influence" which is prohibited by the Directives. The indicator will review the independence of each equality body in the performance of its tasks and in the exercise of its competences vis-à-vis external authorities, as prescribed by Article 3 of the Directives (*"Member States shall take measures to ensure that equality bodies are independent and free from external influence, and that they do not seek or take instructions from the government or from any other public or private entity while performing their tasks and exercising their competences".*)

Having the independence of the equality body provided for by the law is an important legal guarantee. On the contrary, being part of a Ministry would constitute an increased risk of being subject to external influence/being the recipient of instructions. Accountability is also covered because some accountability mechanisms could also jeopardize independence.

The indicator also covers competent bodies where applicable. Recital 26 of Directive 2024/1999 and Recital 25 of Directive 2024/1500, which relate to alternative dispute resolution, provide that *"in selecting another competent entity, it is important to take into consideration entities established on a durable basis and to ensure that the person(s) in charge of the resolution process are **independent**, impartial and possess the necessary expertise."*

Recital 28 of Directive 2024/1999 and Recital 27 of Directive 2024/1500 which relate to inquiries refer to the *"other competent bodies, which can include the relevant public services, such as labour inspectorates or education inspectorates, and the social partners"* which may be entrusted with the conduct of inquiries. A lack of independence of such entrusted bodies would jeopardize the proper application of the Directives by going against their objectives.

F. Data collection and source: *to be filled by the national authorities*

G. Year of information: The indicator should describe the situation at the time of the relevant reporting exercise.

H. Comments and limitations: this indicator is split in two parts, the first part (IF1) relating to the legal framework and the second part (IF2) relating to the practice.

I. Data necessary to fill the indicator:



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IF1	<p>For each equality/competent body, please indicate (Yes /No): (1) whether its independence in the performance of its competences and tasks is provided for in the law (including link/reference to the legal basis); (2) whether it is part of a Ministry (including information about the specific Ministry); and (3) whether and whom it is accountable to.</p> <p><i>NOTE: Please list all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives, should be listed separately.</i></p>					
			1	2	3	4
			[Equality Body Name]	[Equality Body Name]	[Equality Body Name]	[Competent Body Name]
IF1_A Independence legal provision	IF1_A1	Independence is provided for in the law (Y/N)	yes	no	yes	no
	IF1_A1_TEXT	Link/reference to the legal basis [ADD TEXT]	TEXT / hyperlink	TEXT / hyperlink	TEXT / hyperlink	TEXT / hyperlink
	IF1_A2	Equality Body is part of a Ministry (Y/N)				
	IF1_A2_TEXT	Which Ministry? [ADD TEXT]				
IF1_B Accountability	IF1_B1	Are there accountability mechanisms in place? [Y/N]				
	IF1_B2	From the list below, whom are equality bodies accountable to? (Y/N)				
	IF1_B21	Ministry				
	IF1_B22	Government				
	IF1_B23	Parliament				
	IF1_B24	Regional / local authority				
	IF1_B25	Other, please specify	TEXT	TEXT	TEXT	TEXT

IF1_TEXT

Please describe any challenges faced while answering the questions in this part of the questionnaire, in particular those related to the particular situation in your Member State. If at least one of the national equality bodies is part of a Ministry, please explain in detail how it is legally guaranteed that it performs its tasks and exercise its competences without seeking or taking instructions from anybody. [text box]



'INDEPENDENT FUNCTIONING' (IF)

A. Number and Name: IF2

IF2. Does each equality body (and other competent bodies where applicable) have the ability to perform its tasks and exercise its competences without seeking or taking instructions from anybody -in practice/de facto-?

B. Dimension/scope: Independent functioning

C. Objective: Reporting on the independence of equality bodies (competent bodies where relevant), by looking at whether they are free from external influence (from a practical perspective)

D. Definition: the ability of equality bodies to set their priorities independently, i.e. without seeking/taking instructions, is an indication of their independence in practice.

E. Rationale: The indicator will help monitor whether equality bodies/competent bodies where applicable, are able to manage and decide independently on their workplans, as set forth in Article 3 read in conjunction with Recital 18 of Directive 2024/1499 and Recital 17 of Directive 2024/155 (*equality bodies should be able to... set their own priorities*) as well as Article 17(a) of the Directives which provides that *Member States shall ensure that equality bodies (a) adopt a work programme setting out their priorities and prospective activities;*". Equality bodies (and other competent bodies where applicable) should be able to set their main areas of focus according to the relevance of the subject matter and the degree of urgency in the national/regional context. Any compulsory task/timeframe set by the Directives will have to be complied with and should not be considered to negatively affect the capacity to set priorities.

The indicator also covers competent bodies where applicable. Recital 26 of Directive 2024/1999 and Recital 25 of Directive 2024/1500, which relate to alternative dispute resolution, provide that "*in selecting another competent entity, it is important to take into consideration entities established on a durable basis and to ensure that the person(s) in charge of the resolution process are independent, impartial and possess the necessary expertise.*"

Recital 28 of Directive 2024/1999 and Recital 27 of Directive 2024/1500 which relate to inquiries refer to the "*other competent bodies, which can include the relevant public services, such as labour inspectorates or education inspectorates, and the social partners*" which may be entrusted with the conduct of inquiries. A lack of independence of such entrusted bodies would jeopardize the proper application of the Directives by going against their objectives.

F. Data collection and source: To be filled by national authorities

G. Year of information: The indicator should describe the situation at the time of the relevant reporting exercise.

H. Comments and limitations:

I. Data necessary to fill the indicator:



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IF 2 For each equality/competent body, please indicate whether it can independently set its own priorities/areas of focus (Yes/No)

NOTE: Please list all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives, should be listed separately.

	1	2	3	4
	[Equality Body Name]	[Equality Body Name]	[Equality Body Name]	[Competent Body Name]
It can independently set their own priorities/areas of focus (Y/N)	yes	no	yes	no

More questions to be added after the discussion.

IF2_TEXT

Please describe any challenges faced while answering the questions in this part of the questionnaire, in particular those related to the particular situation in your Member State. If at least one of the national equality bodies is part of a Ministry, please explain how it is ensured that it sets its own priorities. [text box]

'INDEPENDENT FUNCTIONING' (IF)

A. Number and Name: IF3 (to be completed)

IF3. Are equality bodies able to manage their own financial resources?

B. Dimension/scope: Independent functioning, financial resources

C. Objective: Reporting on whether equality bodies are able to manage their own financial resources. N.B. This question does not cover staff which is covered by another indicator.

D. Definition: [to be discussed at the meeting].

Discuss also the limitations introduced by the reference to "In line with the objectives of this Directive and within the applicable legal framework." if any (e.g. when equality bodies are part of a Ministry).



- E. Rationale:** The indicator will monitor whether equality bodies are able to manage their own financial resources, without being subject to external influences, in line with Article 3 of the Directives, read in conjunction with Recital 18 of Directive 2024/1499 and Recital 17 of 2024/1500.
- F. Data collection and source:** *To be filled by national authorities*
- G. Year of information:** The indicator should describe the situation at the time of the relevant reporting exercise.
- H. Comments and limitations:**
- I. Data necessary to fill the indicator:** See table below IF3

‘INDEPENDENT FUNCTIONING’ (IF)

A. Number and Name: IF4 (to be completed)

IF4. Does each equality body have the power to select and manage its own staff?

- B. Dimension/scope:** Independent functioning, human resources
- C. Objective:** Reporting on whether equality bodies are able to take their own decisions with regard to their staffing.
- D. Definition:** staff refers to people employed by the body (or potentially by its parent in case of a body within a ministry), irrespective of the type of contract (temporary and permanent).
- E. Rationale:** the indicator will help monitor whether equality bodies are able to manage their own staff, without being subject to external influences, in line with Article 3 of the Directives, read in conjunction with Recital 18 of Directive 2024/1499 and Recital 17 of 2024/1500 which refer to the independent selection and management of equality bodies’ own staff. The selection procedure for the head of the Equality Body is covered by another indicator (IF5).

Discuss the limitations introduced by the reference to “*In line with the objectives of this Directive and within the applicable legal framework.*” if any (e.g. when equality bodies are part of a Ministry).

- F. Data collection and source:** *To be filled by national authorities*
- G. Year of information:** The indicator should describe the situation at the time of the relevant reporting exercise.
- H. Comments and limitations:**
- I. Data necessary to fill the indicator:** see table below

‘INDEPENDENT FUNCTIONING’ (IF)

A. Number and Name: IF5 (to be completed)

IF5 Are there established transparent procedures for the selection, appointment, revocation and potential conflicts of interest of the staff members of equality bodies holding decision-making or managerial positions and, where applicable, members of the governing board?



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- B. Dimension/scope:** independent functioning, human resources
- C. Objective:** Reporting on the procedures in place concerning the selection, appointment, revocation and potential conflicts of interest of the staff of equality bodies holding decision-making or managerial positions, and, where applicable, members of the governing board, in order to guarantee their competence and independence.
- D. Definition:** staff holding decision-making or managerial position supervise the duties of other staff members and are empowered to take decisions and make choices alone or in partnership with other managers. Some equality bodies appoint a governing board: a group of people responsible for overseeing the operation of the equality body and taking strategic key decisions. To be transparent, procedures must be established in writing and publicly communicated ahead of the recruitment process.
- E. Rationale:** the indicator will help reviewing whether pre-established and transparent procedures are in place concerning the selection, appointment, revocation and potential conflicts of interest of the staff of equality bodies holding decision-making or managerial positions, and where applicable members of the governing board, so that their appointment and dismissal are based on objective criteria of independence and competence, in line with Article 3(2) of the Directives, read in conjunction with Recital 18 of Directive 2024/1499 and Recital 17 of 2024/1500. The Recitals provide that both permanent and temporary staff holding decision-making or managerial positions are covered. It also specifies that transparency can be ensured, for example, by publishing vacancy notices publicly.
- F. Data collection and source:** *To be filled by national authorities*
- G. Year of information:** The indicator should describe the situation at the time of the relevant reporting exercise.
- H. Comments and limitations:**
- I. Data necessary to fill the indicator:** See table below (to be completed)

IF3 IF4 IF5	<p>For each equality body, please indicate whether:</p> <ul style="list-style-type: none">-It can manage its own financial resources (Yes/No);-It has the power to select and manage its own staff (Yes/No);-Transparent procedures are in place for the selection, appointment, revocation and potential conflicts of interest of the staff members holding decision-making or managerial positions or of board members (Yes/No) <p><i>NOTE: Please list all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives, should be listed separately.</i></p>						
				1	2	3	4
				[Equality Body Name]	[Equality Body Name]	[Equality Body Name]	[Equality Body Name]
	IF3	It can manage its own financial resources (Y/N)					



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	IF4	It has the power to select and manage its own staff (Y/N)				
	IF5	Transparent procedures are in place for the selection, appointment, revocation and potential conflicts of interest of the staff members holding decision-making or managerial positions or of board members (Y/N)				

IF3-IF4-IF5 TEXT

Please describe any challenges faced while answering the questions in this part of the questionnaire, in particular those related to the particular situation in your Member State.

In particular,

In relation to IF3: if at least one of the national equality bodies is part of a Ministry, please explain in detail how it is guaranteed that it manages its own financial resources [text box].

In relation to IF4: if at least one of the national equality bodies is part of a Ministry, please explain in detail how it is guaranteed that they select and manage their own staff [text box].

In relation to IF5: Please describe the selection, appointment and revocation procedures in place for each equality body for staff members holding decision-making or managerial positions or of board members, specifying how transparency is ensured [text box].

To be completed after the discussion.

‘INDEPENDENT FUNCTIONING’ (IF)

A. Number and Name: IF6 (to be completed)

IF6. Are there safeguards in place to ensure that equality bodies (and other competent bodies where applicable) act impartially while conducting an inquiry or assessing a case?

To be completed after the discussion on independence and powers.

INDEPENDENT FUNCTIONING’ (IF)

B. Number and Name: IF7 (to be completed)



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IF7. In case an equality body is part of a multi-mandate body, does the internal structure of the body guarantee the effective exercise of the equality mandate?

To be completed after the discussion.

Suggestion to include the following replies: Yes/no/dedicated staff/dedicated department/dedicated leadership/specific procedures or rules/other

‘RESOURCES’ (R)

To be completed after the discussion.

A. Number and name

R1. What is the total annual budget of each equality body ?

To be completed after the discussion.

Suggestion to include staff, exclude premises and exclude possible sources of income not provided by the State (these data could be provided in a separate column, when relevant and/or available).

Suggestion to cover each of the 5 years of the reporting period separately (because of the “stable” reference in Recital 22 of Directive 2024/1499 and Recital 21 of Directive 2024/1500 and the annual reporting obligation under Article 17 (b).).

R1	<p>For each equality body, please indicate the total annual budget.</p> <p><i>NOTE: Please list in column 'Equality Bodies in Country' all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives should be listed separately.</i></p>					
	Equality Bodies in [Country]	Total annual budget				
		Year 1	Year 2	Year 3	Year 4	Year 5
1	[Equality Body Name]	Number	Number	Number	Number	Number
2	[Equality Body Name]					
3	[Equality Body Name]					



R1_TEXT To be completed after the discussion.

‘RESOURCES’ (R)

A. Number and name

R2. What is the total expenditure of each equality body?

To be completed after the discussion

Suggestion to include staff, exclude premises and exclude expenditures financed from sources of income not provided by the State (these data could be provided in a separate column, when relevant and/or available).

Suggestion to cover each of the 5 years of the reporting period separately (because of the “stable” reference in Recital 22 of Directive 2024/1499 and Recital 21 of Directive 2024/1500 and the annual reporting obligation under Article 17 (b).).

R2	<p>For each equality body, please indicate the total annual expenditure.</p> <p><i>NOTE: Please list in column 'Equality Bodies in Country' all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives should be listed separately.</i></p>					
	Equality Bodies in [Country]	Total annual expenditure				
		Year 1	Year 2	Year 3	Year 4	Year 5
1	[Equality Body Name]	Number	Number	Number	Number	Number
2	[Equality Body Name]					
3	[Equality Body Name]					

R2_TEXT To be completed after the discussion.



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'RESOURCES' (R)

A. Number and name

R3. What is the expenditure per competence of each equality body?

To be completed after the discussion

Suggestion to include staff, exclude premises and exclude possible sources of income not provided by the State.

R3	For each equality, the total expenditure per competence/power (Amount) or Not applicable if the power/competence is not exercised by the body <i>NOTE: Please list all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives should be listed separately.</i>			
	1	2	3	4
	[Equality Body Name]	[Equality Body Name]	[Equality Body Name]	[Equality Body Name]
R3_1 Prevention and Promotion including Prevention of discrimination Promotion of equal treatment	Amount	Not applicable		
R3_2 Assistance to victims, including Ability to receive and handle complaints Alternative dispute resolution Inquiries Issuing opinions Issuing decisions Litigation				

R3_TEXT

To be completed after the discussion.



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RESOURCES' (R)

A. Number and name

R4. What is the total number of employees of each equality body ?

To be completed after the discussion

Suggestion to include the total number of employees at the end of the year of reporting and any type of contract (i.e. including temporary contracts).

R4	<p>For each equality body, please indicate the total number of employees. <i>NOTE: Please list in column 'Equality Bodies in Country' all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives should be listed separately.</i></p>	
	Equality Bodies in [Country]	Total number of employees
1	[Equality Body Name]	Number
2	[Equality Body Name]	
3	[Equality Body Name]	

R4_TEXT Please specify if the reference year of the data collection was not a representative year and provide the reasons. Please insert data pertaining to a representative year within in the reporting period.

To be completed

RESOURCES' (R)

A. Number and name

R5. What is the number of employees per competence/power of each equality body?

To be completed after the discussion



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R5	For each equality body, please indicate the number of employees per competence/power (Amount) or Not applicable if the power/competence is not exercised by the body <i>NOTE: Please list all bodies that are different entities and designated as equality bodies under the Directives. Regional or local self-standing bodies, which fulfil part of the functions included in the Directives should be listed separately.</i>			
	1	2	3	4
	[Equality Body Name]	[Equality Body Name]	[Equality Body Name]	[Equality Body Name]
R5_1 Prevention and Promotion including Prevention of discrimination Promotion of equal treatment Equality mainstreaming	Number	Not applicable		
R5_2 Assistance to victims, including Ability to receive and handle complaints Alternative dispute resolution Inquiries Issuing opinions Issuing decisions Litigation				

R5_TEXT To be completed after the discussion

RESOURCES' (R)

A. Number and name

R6. Are equality bodies able to perform all their tasks and exercise all their competences effectively, including when they are part of multi-mandate bodies?

To be completed after the discussion.

Suggestion to review, via a table with a list of tasks and competences, how well resources allow equality bodies to perform their tasks and exercise their competences (see table below)



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Resources					
R_6 Tasks/competences	Financial resources From 0 (highly constrained) to 5 (not constrained)	Human resources From 0 (highly constrained) to 5 (not constrained)	Technical resource From 0 (highly constrained) to 5 (not constrained)	Automated systems From 0 (highly constrained) to 5 (not constrained)	Not applicable
Prevention and promotion					
Initial assistance to victims (handling of complaints)					
Alternative dispute resolution					
Inquiries					
Opinions					
Decisions					
Litigation					
Equal access					
Accessibility					
Cooperation					
Consultation and recommendation					
Data collection					
Reports					
Assessment of automated systems					

R6_TEXT To be completed after the discussion

Suggested definition of automated systems: a computer system that is capable of carrying out actions without the necessary review or intervention of a natural person. In line with Recital 21 of



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Directive 2024/1500 and Recital 22 of Directive 2024/1499, automated systems can refer to artificial intelligence systems which are in turn defined in the EU Artificial Intelligence Act as a machine-based system designed to operate with varying levels of autonomy, that may exhibit adaptiveness after deployment and that, for explicit or implicit objectives, infers, from the input it receives, how to generate outputs such as predictions, content, recommendations, or decisions that can influence physical or virtual environments.

R7. Is there a clear mechanism ensuring the stability of the budget of the equality body(ies)?

To be completed after the discussion.

Whether the budget is multiannual could be checked under this indicator as it would contribute to stability.

R8. Are there clear mechanisms in the setting and review of the equality body(ies) budget to take into account the need for adjustments?

To be completed after the discussion.

Suggestion to cover demand driven (new competences, increase in complaints), cost driven (including price inflation, wage inflation, other inflationary measures) and exceptional needs (litigation costs or others)