

# EQUAL, Free Movement of Good Ideas

Working against discrimination  
and inequality in Europe

Employment & European Social Fund



Employment & social affairs



European Commission



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Directorate-General for Employment, Social Affairs and Equal Opportunities  
Unit B4

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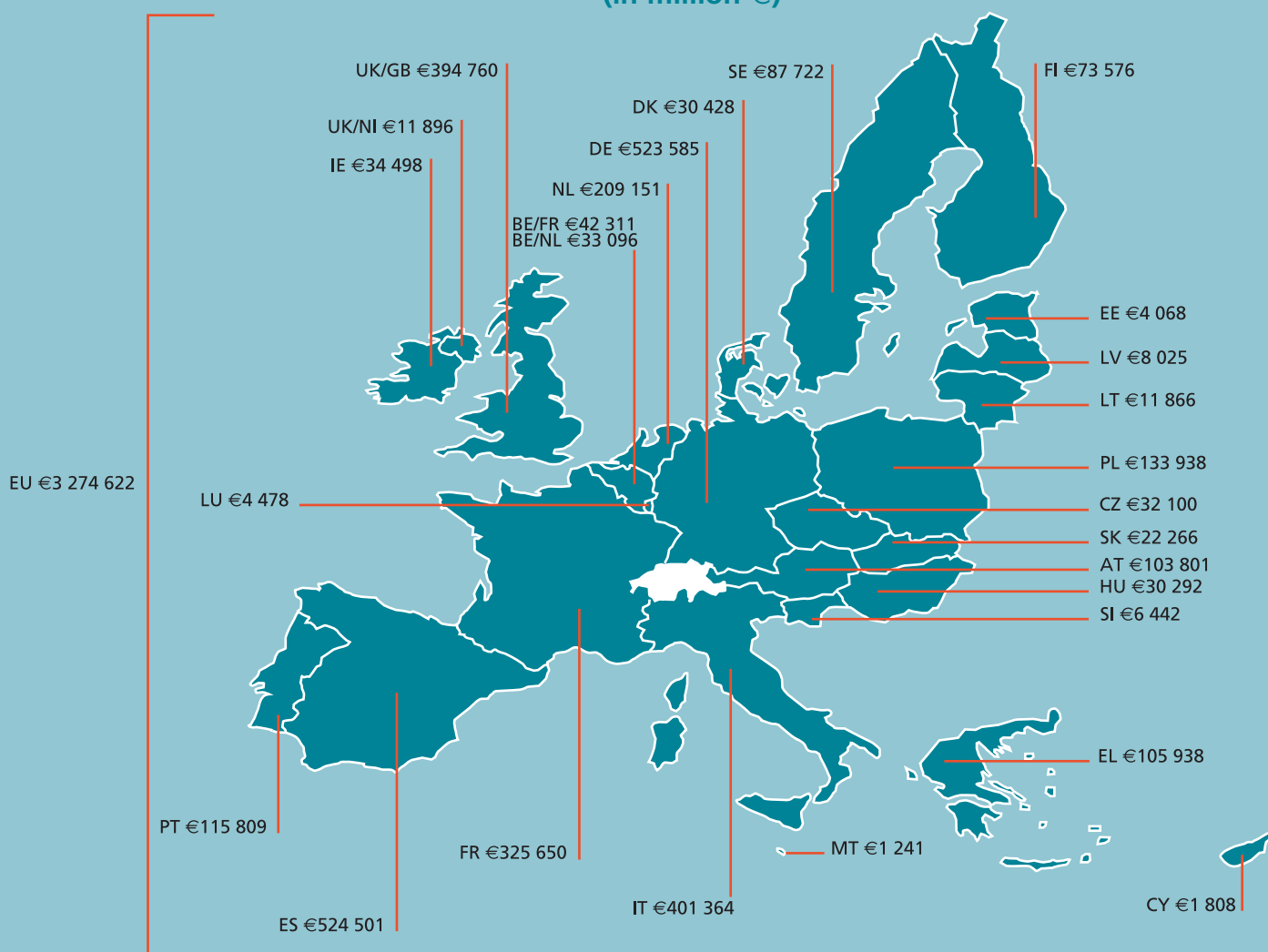
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**Financial allocation 2000-2006 per Member State  
(New Member States only 2004-2006)  
(in million €)**



# THE STRUGGLE AGAINST DISCRIMINATION AND INEQUALITY

Overcoming discrimination in the workplace and in accessing employment is a key element of the European Union's strategy to create more and better jobs. By promoting a more inclusive labour market, the European Union (EU) can increase participation in employment and learning, and maximise the contribution of every individual to the economy and society as a whole.

Innovative and adaptable policy solutions are needed to bring greater inclusiveness to Europe's diverse labour markets, and the European Commission's EQUAL Initiative is helping to provide some of the tools and methods required. The Initiative, launched in 2000, is designed to investigate and test different ways of tackling discrimination in employment and the job market and to share examples of the resulting good practice across borders, with the intention of influencing policy and general practice throughout Europe.

By building partnerships, EQUAL empowers all those involved to promote innovation, share expertise and spread new solutions. In its second round running up to 2008, this unique initiative will continue to generate new ideas and solutions in the field of equality and practical ways to apply them in the workplace and in accessing work.

## MORE AND BETTER JOBS FOR ALL

At the Lisbon European Summit in March 2000, the European Union set itself the goal of *becoming the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion* by 2010. By achieving such a target, the Union will create the conditions necessary for full employment and greater social cohesion.

Attainment of this goal is supported by the European Social Inclusion Process and the European Employment Strategy, among other initiatives. They are designed to give direction to the employment policy priorities of EU Member States and ensure their convergence. Many of the activities covered by these strategies are financed by the European Social Fund.



Today, the gap between the goals set out at Lisbon and Stockholm, and Europe's current employment situation remains significant. Joblessness has increased with the economic slowdown, reaching high levels in a number of EU countries. Boosting employment has therefore become a political, social and economic necessity. In practice this means increasing the adaptability of workers and enterprises, attracting more people to the labour market, increasing investment in human capital, and generating, exchanging and using good practice.

### The Lisbon (2000) and Stockholm (2001) Employment goals

- To become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion;
- To reach an employment rate of 70% and to increase the quota of women in employment to more than 60% and of older workers to more than 50%, by 2010.

## A LABOUR MARKET OPEN TO ALL

Discrimination in employment can marginalise individuals and reduce their productivity and overall contribution to society. Most often, a person is said to be discriminated against at work if they are treated less favourably than someone else on the grounds of such commonly defined prejudices as sex, race or ethnic origin, religion or belief, disability, age, or sexual orientation. Discriminatory practices or behaviour can take both 'direct' and 'indirect' guises, while other forms include personal harassment, abuse or victimisation.

These sorts of discrimination and inequality conflict with the European social model. However, since the introduction of Article 13 in the Treaty of Amsterdam in 1997, the European Union has been able to take appropriate action to combat them. Several laws have been adopted, such as the 'Race Equality' Directive (Council Directive 2000/43/EC) and the 'Employment Equality' Directive (Council Directive 2000/78/EC). These laws recognise that it is an individual's basic human right to apply for work, and to go about their work, unhindered by prejudice.

The EQUAL Initiative seeks to explore and test effective ways to fight all forms of discrimination present in the labour market. Multiple acts of discrimination, such as inequality at work and discriminatory access to the workplace, often reinforce each other, so that new sources of discrimination and inequality are constantly emerging (e.g. the digital divide). With the accession of the new Member States to the EU in 2004, both the inte-

gration of the Union's ethnic minorities and the need to develop and share good practice in combating discrimination at work and access to work have become even more important.

An example of discrimination is paying one person less than another, on the grounds of prejudice (sex, race or ethnic origin, religion or belief, disability, age, sexual orientation), even though both hold a comparable job and have similar skills and experience.



The fact that discrimination can be hard to detect and that much of it goes unreported makes it difficult to fully assess the scale of the problem. However, in a survey conducted in June 2003, the European Commission's Statistical Office (Eurostat), asked European citizens to relate if they had experienced or witnessed discriminatory practices in employment, education or access to goods and services. Most people surveyed said they thought that ethnic origin, religion,

disability, sexual orientation, or age were the main obstacles to finding employment. The majority felt that the bias against ethnic minorities in the workplace was the most widespread form of discrimination. The survey results also pointed out four main areas where respondents considered discrimination is most likely to be practised: employment, housing, education and personal services.



## WHAT IS THE EQUAL INITIATIVE?

EQUAL is a Community Initiative, which serves as a laboratory for inclusive ways of delivering European labour market policies and actions. In this way, it makes an important contribution to ongoing labour market reform. It supports both the translation of the European Employment Strategy into National Action Plans for Employment and for Social Inclusion, and the implementation of gender equality legislation across the EU.

Jointly financed by the European Social Fund and national governments, it provides an experimental platform for all stakeholders in employment policies to explore, develop, test and share good practice. With respect to tackling discrimination in employment and training, it aims to identify what works and what does not work, and why.



EQUAL differs from other European Social Fund programmes in its innovative dimension and its emphasis on active cooperation between Member States and stakeholders.

To achieve its goal of a non-discriminating and sustainable labour market, EQUAL is structured around six key principles, or 'building blocks':

- Tackling complex problems by involving all relevant stakeholders and empowering them to combat discrimination and exclusion at work and in access to work; ➔ **Partnership and empowerment**
- Learning from experiences in other Member States; ➔ **Transnational cooperation**
- Making gender equality an integral part of all policies and practices; ➔ **Gender mainstreaming**
- Focusing on priority issues where groups of Member States expect that transnational cooperation will help them develop ways to improve the delivery of their national labour market policies; ➔ **Thematic focus**
- Developing and testing new approaches; ➔ **Innovation**
- Sharing good practice and influencing policies and practices. ➔ **Mainstreaming**

### EQUAL facts and figures

The European Union co-finances EQUAL with national governments in all EU Member States. Responsibility for the implementation of the programmes in the Member States lies with the national authorities (in most cases Ministries of Employment).

The EU contribution to EQUAL stands at approximately EUR 3.2 billion, and is complemented by public national co-funding of over EUR 2.2 billion.

The two calls for proposals for EQUAL Development Partnerships were organised in the Member States in 2001 and in 2004.

All 25 Member States are participating in the second round of EQUAL (2004-2008). There are a total of 27 programmes, since Belgium and the UK have two programmes each.

About 3,000 EQUAL Development Partnerships work on the ground: about half of these in the first round (2001-2004) and the other half in the second (2004-2008).

Detailed tables presenting a breakdown of Development Partnerships by Member State and thematic field are available at:  
<https://equal.cec.eu.int/equal/jsp/index.jsp>



## PARTNERSHIP AND EMPOWERMENT: INVOLVING AND EMPOWERING ALL RELEVANT STAKEHOLDERS

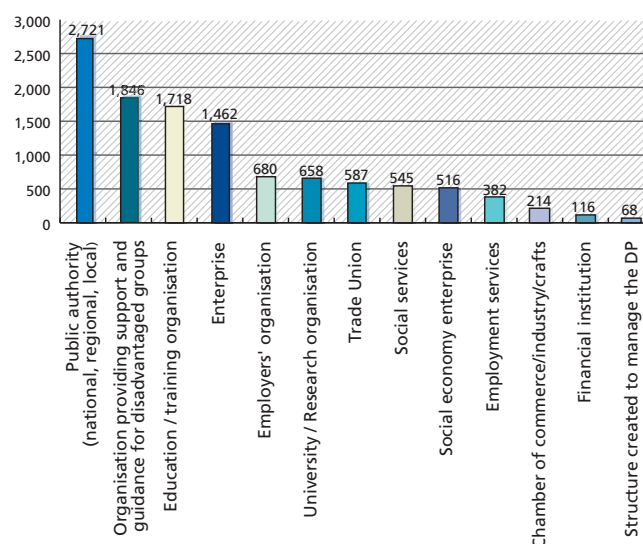
EQUAL supports **Development Partnerships** involving key stakeholders such as local and regional authorities, public employment services, non-governmental organisations, the business sector (particularly SMEs) and social partners.

By working with such a wide variety of partners, EQUAL ensures that its actions have greater relevance, effectiveness and efficiency in addressing discrimination and inequality in the labour market. Stakeholders and disadvantaged people are involved from the beginning in the needs analysis and in the design and implementation of all activities. The involvement of the private and public sectors and non-governmental organisations creates a forum for dialogue and for building consensus.

Partnerships bring about a critical mass that can

impact on policy makers' decisions and thereby facilitate lasting structural changes. They also reduce duplication of efforts and bring results that could not be achieved by one actor operating alone. Furthermore, by involving a diversity of actors, they also bring in fresh ideas that challenge established viewpoints and can tackle problems that are multi-dimensional (involving a variety of perspectives) and multi-level (involving local, regional, national and even European issues).

### Number and type of partners working in the EQUAL Development Partnerships of the first round



### Partnerships under EQUAL have been successful if they are:

**Inclusive/holistic:** This requires recognising the multi-level and multi-dimensional nature of issues, and the commitment and participation of all partners, including employers and, in particular, to consult and involve in the work of the partnership people who are disadvantaged in the labour market.

**Transparent:** This can be achieved if the partnership has clear goals and transparent structures and processes that encourage the participation of partners, people who are disadvantaged in the labour market and wider stakeholders.

**Sharing:** The promotion of a partnership "learning culture" is key to improving efficiency and effectiveness. Partners will be able to learn from one another by

allowing new ideas to come forward through open exchanges of experience. This enables successful models to be replicated and/or adapted. Such learning needs to be frank and open so that failures as well as successes can be discussed. By sharing proactively, partners are also made aware of possible obstacles to partnership-building and how these might be overcome.

**Patient:** The objectives of the partnership are ambitious, the challenges complex, and the solutions associated with risks. A further facilitating success is therefore allocating time to discussion, review and relationship-building with partners and stakeholders. This helps foster mutual respect and understanding – the pre-conditions for trust.

## TRANSNATIONAL COOPERATION: LEARNING FROM EXPERIENCES IN OTHER MEMBER STATES

Creating a more inclusive labour market across Europe is an ambitious and challenging task. Transnational cooperation can play a key role in securing the right learning environment.

EQUAL has been structured to foster and promote effective transnational cooperation and to encourage the transfer of know-how and good practice between partnerships and between Member States. This sharing and exchange of results provides real benefits for policy development at all levels.

Transnational cooperation occurs at three levels:

- between Development Partnerships
- between national thematic networks of Development Partnerships
- between the responsible EQUAL Managing Authorities and key people and organisations across the EU.

EQUAL's experience has shown that transnational cooperation is not easy, but it can often be the most effective way of achieving results unattainable under normal circumstances. This is because transnational cooperation provides a tool for the kind of lateral thinking required to achieve innovation.



The transnational dimension in EQUAL is not simply “an add-on” for a few actors, but an integral part of all the partners’ work. A key factor in EQUAL’s success has been the fact that every partner takes part in the core ideas of experimenting and sharing in the programme.

### Facts and figures on transnational cooperation under EQUAL

EQUAL requires at least two Development Partnerships from two different Member States to agree on a common workplan to develop or jointly test new approaches, services or products. By September 2004, 487 Transnational Cooperation Agreements had been established involving more than 1,350 Development Partnerships.

The budgets allocated by the Development Partnerships to transnational cooperation vary widely with an average of EUR 347,000 per Transnational Partnership.

For more detailed information, please consult the EQUAL common database:  
<https://equal.cec.eu.int/equal/jsp/index.jsp>

### Example of transnational cooperation between Development Partnerships:

Four EQUAL Development Partnerships (from Austria, Italy, Hungary, and Portugal) are jointly carrying out their activities under a Transnational Cooperation Agreement. The Portuguese partnership is endeavouring to implement 19 equality plans in companies and organisations throughout the country; in Italy, the partnership is working on life-long learning; and in Hungary, it is aiming to increase the employability of the Roma community. Transnational exchange has generated a learning process that is helping all partners both to take more account of the needs of ethnic minorities and to integrate a gender dimension into their activities. Building on the Portuguese experience, for example, the Hungarian partners are producing a guide to help enterprises introduce equality plans covering both gender and ethnicity.



## **GENDER MAINSTREAMING: MAKING GENDER EQUALITY AN INTEGRAL PART OF ALL POLICIES AND PRACTICES**

The equal participation of women and men in all aspects of society reflects its level of political maturity, and is crucial for lasting growth and democracy. This ambitious goal is, however, still far from being achieved, despite substantial progress spearheaded by the EU over the past 40 years.

The failure to transform the position of women, and by extension men, has led policy makers and those in the equality field to question the impact of equal opportunity policies. There has been a realisation that society's structures and practices and the relationship between women and men needed a radical rethink to root out the deep-seated and often hidden causes of inequality. This tool became known as the gender mainstreaming approach.

Gender mainstreaming recognises that specific initiatives are insufficient to bring major change on their own. It focuses instead on the social differences between women and men, accepting that differences which are learned can change over time and vary within and between cultures. It also makes gender equality an integral part of all policies and practices.

## **THEMATIC FOCUS: SHARING EXPERIENCE ON PRIORITY ISSUES**

EU countries prioritised nine thematic fields in which to share experience and learn from each other (see box).

For each theme, the Commission, in partnership with the Member States, has established a platform to facilitate the sharing of experience. Similarly there are policy fora where developers of good practice and policy makers/multipliers can meet. These platforms enable stakeholders to share awareness and commitment to tackling relevant issues, to articulate policy needs, and to discuss innovative solutions and the conditions for their implementation on a larger scale.

## **INNOVATION: DEVELOPING AND TESTING NEW APPROACHES**

EQUAL is a laboratory where relevant stakeholders commit themselves to develop, test and validate new strategic approaches to employment and anti-discrimination in partnership.

It is testing and piloting new ways of delivering inclusive policies and actions for employment and training. Such new methods might include the transfer of a certain model to a different regional or national context, a new combination of existing practices, or significantly changed ways and means of doing things. Furthermore, innovation does not just



### **The nine thematic fields in EQUAL**

- Access and return to the labour market
- Combating racism
- Business creation
- Social economy
- Life long learning
- Adaptation to change
- Reconciling family and working life
- Reducing gender gaps
- Integration of asylum seekers

apply to content or approach. The way the Development Partnerships are formed and work together may also be an innovation.

Innovation is not an objective in itself: it is a powerful means of policy development, testing on a small scale what works, what barriers need to be overcome, and what roles the public sector and non-governmental stakeholders are willing and able to play.

By involving all stakeholders, EQUAL can address cross-cutting policy issues, work across and beyond institutional boundaries, and contribute to an effective transfer and adoption of the results.

## MAINSTREAMING: TRANSFERRING THE LESSONS LEARNT INTO POLICY AND PRACTICE

At the heart of EQUAL lies the principle of integrating and incorporating newly developed ideas and approaches into policy and practice. But innovative results do not automatically find their way to decision makers - sometimes new approaches will be met with resistance. EQUAL therefore provides structures and tools for transferring good practices to policy makers and key stakeholders, both at national and European level. All Member States have established active mechanisms to test and validate effective, efficient and inclusive solutions in the implementation of labour market policies. These processes include assessing the relevance of the results and the advantages they offer compared to established policies and actions,



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validating the lessons learnt, and clarifying the conditions under which they were achieved.

EQUAL contributes to effective policy making by finding out on the ground what works and what does not, and ensuring that all key stakeholders can learn the lessons. The results are summarised and made public, and are used to enrich the policy peer reviews set up in the European Employment Strategy, the Social Inclusion Process, evaluation activities at European Union level, and the dissemination and exchange activities of the Community Programmes under Articles 13 (combating discrimination) and 137 (promoting social inclusion) of the EU Treaty.

In order to organise these processes effectively, Member States and the European Commission have established networks of public authorities, Development Partnerships and stakeholders, at national and EU levels, to discuss and evaluate the most promising practices and outcomes of their work.

### Thematic working groups at EU level in 2004

#### Employability

- The involvement of employers
- The role of the trade unions
- People with disabilities
- Strategies for networking
- Ethnic minorities and migrants

#### Entrepreneurship

- Business creation
- Social economy

#### Adaptability

- Lifelong learning
- Age management

#### Equal Opportunities

- Family support and care provision
- Horizontal and vertical desegregation
- Gender mainstreaming
- Territorial approach

#### Asylum seekers

- Education, training and advice
- Employment
- Capacity building
- Skills audit

# HARVESTING THE RESULTS OF EQUAL ACTIVITIES

The Development Partnerships established under EQUAL are producing promising results in many fields, some of which are presented below. The first round of EQUAL (started in 2001), has already demonstrated new ways of tackling discrimination and inequality in the workplace. More information about EQUAL's latest results and activities can be found at: [http://europa.eu.int/comm/employment\\_social/equal/activities/index\\_en.cfm](http://europa.eu.int/comm/employment_social/equal/activities/index_en.cfm).

## DISABILITY

EQUAL is enhancing employment opportunities for people with disabilities through the combined delivery of training and consultancy services targeted at employers. For example EQUAL has developed services in recruitment and selection, disability awareness training, environmental assessment to ensure that the workplace is accessible, and advisory services on the financial incentives involved in hiring and retaining a person with a disability. EQUAL is also trying to make the reintegration process "demand-driven" rather than "supply-directed", which means that the individual with a disability should be "empowered" to become the lead actor in the process through the best possible development of his/her skills and knowledge.

## AGE MANAGEMENT

Age management is one of the major social issues in today's Europe. EQUAL Development Partnerships have taken a multidimensional approach to this challenge, involving various tools and a number of players. They aim to influence employers' attitudes to age, develop a working lifecycle perspective for human resources, promote worker health and safety and links between generations, and mobilise all stakeholders.

EQUAL's partnerships have already made a noticeable impact in this field. They have determined that the greatest source of motivation for older workers is recognition by employers of their capacity to contribute to solutions. Organising "coaching sessions" that allow workers to give their input and to come up with their own ideas is one way that companies can address this issue. Such sessions give older workers the opportunity to express their knowledge, demonstrating to employers that they are "culture carriers" for the company. The question is not solely one of engaging older workers in training. They also need to be supported, made aware of the choices available to them, and be given the opportunity to move into new areas of work that fit their changing priorities and make use of their skills and experience.





## BUSINESS START-UP BY UNEMPLOYED OR INACTIVE PERSONS

There is strong evidence that business finance is not getting through to vulnerable groups and areas. However, improving the business start-up rate among disadvantaged and under-represented groups such as women or ethnic minorities may be a more cost-effective approach to moving people out of unemployment and inactivity. EQUAL provides business support to marginalised groups, enhances their entrepreneurial capacity and develops high quality support systems for all. EQUAL partnerships generally concentrate on the human capital side of the equation in entrepreneurship, dealing with barriers both in supply of finance (private and public financiers) and in demand (their possible clients). New methods are being tested to transform informal economic activities, often carried out by ethnic minorities or travellers, into formal businesses, thus providing individuals with skills, status, income and autonomy. EQUAL is working together with rotating funds financed by other sources in order to build the financial capacity of community groups and disadvantaged individuals.

## HELPING EMPLOYERS PROMOTE DIVERSITY

Several Development Partnerships have found that employers are most convinced to promote diversity action when fellow employers “testify” to the positive effects of diversity strategies on their business (e.g. with regard to conflict management and stress reduction, fluctuation and absenteeism, corporate image and diversification of services). Such exchanges have been facilitated by the setting up of award systems for “Equal Opportunity Employers”, the showcasing of role models, the organisation of employers’ round tables at local level, and the development of local employer networks. There is also positive experience of transferring good practice and the use of role models provided by transnational partners.



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## GIVING INCLUSIVE ACCESS TO LEARNING

Another challenge being tackled by EQUAL is the promotion of learning among those normally excluded from the formal learning environment. Access to learning is often restricted by time and life pressures and a lack of experience of learning. One way to overcome these barriers is to use information and communication technologies in innovative locations, like supermarkets, to maximise uptake of alternative learning techniques.

Individuals with low levels of basic skills and/or no qualifications face a number of barriers to accessing training and learning. EQUAL is enabling a range of partners - and new partnerships - to make a difference by working together in new ways in a local context. A range of municipalities have come together for the first time to deliver an intermediate system of education and training services tailored to these learners.



## GENDER SEGREGATION IN SECTORS AND OCCUPATIONS

By working with children and young people, EQUAL is addressing both the role sharing and vocational choices of future generations, and challenging the prevailing attitudes of the current parent generation. Innovative curricula for primary and secondary schools have been tested, which confront traditional gender roles and the subtle integration of the related stereotypes into science and technology. These schemes use household processes, such as cooking, baking or ironing to explain certain phenomena in chemistry and physics. So far, they have encouraged female students to consider science as a possible career choice and male students are learning to attach greater value to household tasks.

## SHARING OF CARE AND HOUSEHOLD RESPONSIBILITIES

A Dutch media campaign, “Men are taking the lead,” has been used to kickstart a national debate on the importance of active fatherhood. Discussions were launched with massive media advertisements, supported by press conferences, an Internet site and a talk show (2x12 programmes). The first message communicated through the TV commercials confronted men with the excuses they tend to make to avoid taking up more responsibilities at home.

After a while, the strategy was fine-tuned and concentrated on motivation and inspiration rather than provocation. The second wave of messages addressed the need for women to learn to let go of their “household and care monopoly” by recognising that men’s ways of caring for children or of managing the household might be different to their own, but equally effective.

In cooperation with large companies in the Netherlands, non-governmental organisations and the country’s top football team, EQUAL has also been organising activities to promote the benefits of fathers spending quality time with their kids. According to a final impact analysis in May 2004, some 55% of the Dutch population were aware of the campaign. Furthermore, 59% of the men and 52% of the women surveyed were reported to be discussing the division of family tasks at least once a month as a result.

## CORPORATE SOCIAL RESPONSIBILITY

Small businesses do not have extensive human resource structures. Consequently, approaches to diversity drawing on Corporate Social Responsibility tend to be less attractive and less relevant to them. EQUAL is searching for new ways of motivating this sector of the economy to play an active role in the integration of disadvantaged groups and different types of action, such as supported employment and assistance from intermediary agents, are being tested. Positive results have been achieved through face-to-face contact with employers from small enterprises, and through providing sustainable support and services (e.g. training programmes, mentoring, case management and job profiling and matching) that help businesses cope with issues related to the employment of people with special needs.



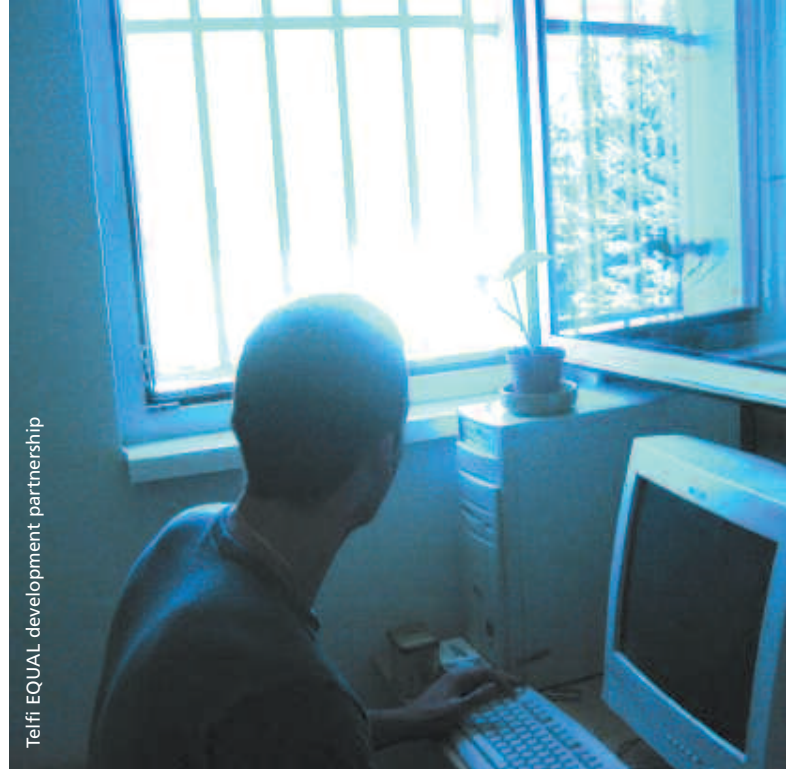


## REINTEGRATION OF FORMER PRISONERS TO COMBAT EXCLUSION

EQUAL is assessing and validating the existing skills of prisoners with the aim of feeding this experience into mainstream training and reintegration practices. Too often ex-prisoners are left to their own devices once released. With low self-esteem and often low levels of education, their chances of finding a job are poor, with the consequent risk of reoffending. Discrimination on the labour market is rife, with many employers reluctant to hire an ex-prisoner. EQUAL's partnership is wide, including social partners, educational institutes, public employment services, Ministries of Justice and interest groups. Efforts are not limited to training, however, as the reintegration of ex-prisoners into society is also essential. This process is enhanced by including the relevant institutions in the partnership.

## SOCIAL ECONOMY TO CREATE MORE JOBS AND ENHANCE THEIR QUALITY

EQUAL is testing the feasibility of franchising in the social economy. A small, social cooperative operating a hotel has been adopted as a business model as a result of its economic success and successful inclusion of disadvantaged workers through training in professional skills. EQUAL is enabling disadvantaged groups in other Member States to pilot this business idea and its development process. The approach can also be extended into new business fields and could result in a new European franchising structure owned by social economy actors at the end of the programme.



Telfi EQUAL development partnership

## ASYLUM SEEKERS

The inclusion of the asylum seekers theme in EQUAL has enabled greater understanding of the ways in which national policies affect this group's access to the labour market, education and training. At local level, the work of partnerships has demonstrated the benefits of a range of support options for asylum seekers, from access to language training and voluntary work to employment in the open market. EQUAL provides a good opportunity for the Member States to work together in identifying good practice relating to the social and vocational integration of asylum seekers. It benefits from the adoption of Directives related to the Common Asylum Seekers Policy, which allows activities to be focused exclusively on asylum seekers, rather than those benefiting from other forms of protection.

## TO GET IN TOUCH



Although the two EQUAL calls for proposals have already taken place (in 2001 and 2004), Development Partnerships will still be actively implementing their work programmes up to 2008.

Overcoming discrimination, inequality and disadvantage requires the commitment of everybody and there are several ways to support EQUAL in its work. You could find out which Development Partnerships exist in your area and check how you could contribute to their work. This could include participating in events and networks, sharing professional skills and experience, or helping to gain media coverage. You could also support EQUAL's work by ensuring that the lessons learnt from the Development Partnerships are integrated into wider policy through lobbying, writing about their work, and speaking about them at relevant events.

EQUAL activities are happening all around the EU. They are usually coordinated by the national Ministry of Employment. You can obtain further information on national EQUAL activities by consulting the addresses and websites of the relevant national body below. Updated information can be found:

In the European Commission:  
DG Employment, Social Affairs and  
Equal Opportunities  
ESF - B/4  
B - 1049 Bruxelles/Brussel  
Tel.: +(32) 2 296 98 85  
Fax: +(32) 2 296 97 70  
<http://europa.eu.int/comm/equal>  
[empl-equal-info@cec.eu.int](mailto:empl-equal-info@cec.eu.int)

Information, results and guides on many European-level mainstreaming and coordination activities can be found on the EQUAL website. If you have any further EQUAL-related queries, you are invited to address them to the above mentioned e-mail address.

## IN THE MEMBER STATES:

### BELGIË

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