



Poverty & Inequality

Applying an Equality Dimension to Poverty Proofing

POVERTY AND INEQUALITY:
Applying an Equality Dimension
to Poverty Proofing

Combat Poverty Agency
Equality Authority

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Foreword

Applying an Equality Dimension to Poverty Proofing

► INTRODUCTION

The assessment of policies for their impact on poverty, known as poverty proofing, was introduced in government departments in 1998, following on from the publication of the National Anti-Poverty Strategy (NAPS) in 1997. This requirement was in the Cabinet Handbook which stated that memoranda for the Government *should indicate clearly the impact of the proposal on groups in poverty or at risk of falling into poverty in the case of significant policy proposals.*

A definition of poverty

*People are living in poverty if their income and resources (material, cultural and social) are so inadequate as to preclude them from having a standard of living which is regarded as acceptable by Irish society generally. As a result of inadequate income and resources people may be excluded and marginalised from participating in activities which are considered the norm for other people in society.*¹

A definition of poverty proofing

*Poverty proofing is the process by which government departments, local authorities and State agencies assess policies and programmes at design and review stages in relation to the likely impact that they will have or have had on poverty and on inequalities which are likely to lead to poverty, with a view to poverty reduction.*²

Guidelines on how to apply poverty proofing stated that particular attention should be paid to *inequalities which lead to poverty*. These could arise, for instance, in the context of age, gender, disability, belonging to a minority ethnic group (including membership of the Traveller community) or sexual orientation.³

The application of this question in the Guidelines is proving difficult. Some of the issues cited are the limited awareness of the links between inequality and poverty and the implications of inequality and equality for particular poverty areas. Work undertaken by a *Partnership 2000*⁴ Working Group on Equality Proofing in 1999 also identified these difficulties. The Working Group defined equality proofing as:

*The (re)organisation, improvement, development and evaluation of policy processes, so that a(n) ... equality perspective is incorporated in all policies at all levels and at all stages, by the actors normally involved in policy-making.*⁵

The Working Group on Equality Proofing recommended that a joint research project should be developed by the Equality Authority and the Combat Poverty Agency to assess, develop and support the application of the question in the Poverty Proofing Guidelines relating to inequalities likely to lead to poverty and to give clarity as to how best to apply this question. The work should also make links with the review of poverty proofing, being undertaken by the National Economic and Social Council (NESC).⁶

The Combat Poverty Agency is the statutory body established to advise the government on economic and social issues pertaining to poverty through research, project innovation and evaluation and public education. The Combat Poverty Agency was involved in the development of the National Anti-Poverty Strategy and in the evolution of the Poverty Proofing Guidelines, which were developed through the social partnership process.

The Equality Authority is the statutory body established under the equality legislation. The Employment Equality Act 1998 and the Equal Status Act 2000 mandate the Equality Authority to work towards the elimination of discrimination and to promote equality of opportunity in the areas covered by the legislation across the nine grounds of gender, marital status, family status, age, disability, sexual orientation, race, religion and membership of the Traveller community.

Both organisations are concerned to develop an improved understanding of the poverty/equality interface and to support the development of poverty and equality proofing. Discrimination and inequality are causal factors for poverty and need to be a focus within anti-poverty strategies. The experience of poverty combined with that of inequality and discrimination creates situations that require a specific focus in promoting

equality of opportunity and combating discrimination. It is hoped that this Report will contribute to further developing this understanding.

► CONCEPTUAL LINKS BETWEEN POVERTY AND INEQUALITY

Part I of the Report sets out the conceptual links between poverty and inequality. It is important to understand these links in order to have a conceptual framework in which to apply poverty proofing and in particular to assess inequalities that lead to poverty.

The author of Part I, John Baker, sets out ten reasons connecting poverty and equality. These are summarised as follows:

1. Relieving poverty is intrinsically redistributive
2. The poverty line is a function of the overall inequality in society
3. Equal opportunity improves the prospects for getting out of poverty
4. Equal opportunity depends on economic, cultural, political and affective equality
5. The prospect of effective anti-poverty measures depends on greater equality of power
6. The prospect of effective poverty relief depends on greater equality of respect and recognition
7. The more people care about equality, the more will be done to eliminate poverty; and the more unequal our society, the less people will care about either poverty or equality
8. If poverty relief depends on growth, then it depends on greater equality
9. If the prospects for growth are limited, then poverty can only be relieved by greater equality
10. The central arguments for eliminating poverty are arguments for equality.

Baker argues that there are intrinsic linkages between poverty and inequality and in working towards a poverty-free society we need to address both poverty and inequality. His contribution to this Report helps us to see and understand these linkages and so assist in applying the question “inequalities leading to poverty” as set out in the poverty proofing Guidelines. He argues that there is a need to engage in equality proofing as part of this poverty proofing process.

► PRACTICAL APPLICATION OF “INEQUALITIES LEADING TO POVERTY”

Part II of the Report examines the practical application of the “inequalities leading to poverty” question in the poverty proofing Guidelines.

Nexus Research Co-operative, who undertook the research for Part II of this Report, found that there is limited and often uneven awareness of the links between inequality and poverty. When the relevance of a policy to a particular group experiencing inequality and poverty is apparent, time pressures and lack of supporting resources can often mean that the policy is not effectively equality/poverty proofed.

This Report seeks to address these barriers. Part II proposes a template to assist policy makers in applying the “inequalities leading to poverty” question in the poverty proofing Guidelines, through a series of “trigger” questions.

For each of the grounds identified in the Guidelines as possibly experiencing inequalities leading to poverty – age, gender, disability, ethnicity (including Travellers) and sexual orientation – the following template is used:

- introduction to the ground and its position in Irish society;
- a characteristic which identifies the ground;
- how this characteristic is linked to inequality across a number of sectoral areas e.g. education, employment, income, housing/accommodation, health and social participation;
- how these inequalities are likely to lead to poverty.

The characteristics identified are those with the potential for “triggering” a response from policy makers in terms of applying the poverty proofing question on inequalities likely to lead to poverty. They provide a simple test in assessing the relevance of the policy area to particular groups experiencing inequality and in establishing the need for a specific focus on the group within the policy being proposed. The characteristics should be seen as the first, rather than the ultimate, test in applying an equality dimension to poverty proofing. They provide the basis for a screening exercise so that policy makers can assess the need to include a focus on a particular group experiencing inequality as they poverty proof their policies.

In consultation with organisations working with the grounds identified, the key characteristics to “trigger” a response have been identified as follows:

Younger people: Children and young people are in a learning phase of life and are more economically dependent than adults.

Older people: Older people are moving towards the latter phase of their working lives and may experience a reduction in their level of income and diminished access to services.

Gender: Women have traditionally been more economically dependent than men. They now play multiple roles while continuing to have primary responsibility for care.

Disability: People with disabilities are operating within a disabling social, cultural, economic and physical environment. They also have diverse needs based upon diverse levels and types of impairment.

Travellers: Travellers have a nomadic tradition and a means of communication, beliefs, values and practices distinct from the majority culture.

Black and other minority ethnic groups: Black and other minority ethnic groups have their own means of communication, beliefs, values and practices distinct from the majority culture.

Sexual orientation: Lesbians and gay men are attracted to and may form relationships with people of the same gender. While lesbians and gay men may comprise up to 10 per cent of any given population, many choose to hide their identity.

In applying the question on inequalities likely to lead to poverty, the Report recommends the following steps.

1. Assess the policy or programme being proofed against the characteristic identified for each group by asking:
 - Does the policy or programme have a particular relevance to the group?
 - Does the characteristic suggest the need for a specific focus on the group in the design and delivery of this policy or programme?
2. If the answers to step one are “yes”, identify from the text provided on the group what knowledge is required and where this knowledge can be sourced to ensure that the design and delivery of this policy or programme take account of the specific identity, situation and experience of the group.
3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on the group. Then explore adjustments that could be made to maximise the benefits or outcomes for the group from the policy or programme.

► IMPLICATIONS OF THE REPORT

There are a number of implications from the findings of this Report.

Firstly, there is a need to acknowledge and understand the interconnections between poverty and inequality. There is also a need to address the broader issues pertaining to inequality if poverty in Ireland is to be eliminated, in terms of the

targets established in the revised National Anti-Poverty Strategy, *Building an Inclusive Society*. This Report sets out some of these linkages.

Secondly, there is a need for mechanisms to address these inequalities which lead to poverty. The development of the poverty proofing process to enhance the focus on inequalities likely to lead to poverty is one way of doing this. This Report provides a template to support this by identifying characteristics and trigger questions.

Thirdly, data and information are required to assist in applying poverty proofing. Various initiatives are underway to develop poverty and inequality data sources including the proposed data strategy to be developed as part of the revised National Anti-Poverty Strategy.

Fourthly, training will be required to ensure that this Report and other relevant material are available to, and effectively applied by, those who will undertake poverty proofing. Resource materials are needed to assist in the application of equality/poverty proofing.

Fifthly, it is clear from this Report that it is necessary to work with, and ensure the participation of, the population groups affected by inequalities leading to poverty. Since these groups have first hand experience, they and their organisations are best placed to know what policies or programmes are most relevant to their identity, situation and experience.

▶ KEY CHALLENGES

The Combat Poverty Agency and the Equality Authority recognise the following challenges in taking this work forward.

- This Report should be widely distributed to all public servants likely to be involved in poverty proofing.
- There is a need for pilot projects in a small number of government departments to test the application of the approach suggested in this Report.
- The supports required to apply the question in the poverty proofing Guidelines on inequalities leading to poverty should be developed and made available. These should include the preparation of training material from this Report and other work on poverty proofing and the inclusion of poverty proofing in training modules for public servants. All relevant data should be gathered and made available to public servants, in written form or through the internet. Additional supports and advice are available from the Combat Poverty Agency and the Equality Authority, as required.
- The various data initiatives being developed, including the NAPS Data Strategy, initiatives on equality statistics, and the data gathered on the implementation of the National Development Plan, need to ensure that data can be disaggregated by the range of equality grounds in the equality legislation and by income and socio-economic status. Progress is being made on this front through the development of a framework for

social statistics in Ireland, being led by the National Statistics Board.⁷

- The participation of those groups affected by inequality and poverty and their organisations should be secured to ensure that policies have an effective impact on addressing inequalities and poverty.
- Local authorities and other organisations making policies and delivering services at a regional and local level should apply poverty proofing, taking into account inequalities which lead to poverty.⁸
- This Report should be the start of work to develop a more integrated proofing process which brings together the related proofing agendas of gender, poverty and equality.

► CONCLUSIONS

This Report is one of a number which can contribute to our understanding of the links between poverty and inequality.⁹ It can assist in the development of the equality/poverty proofing process and can be used to build on existing work and contribute to the development of a more integrated proofing process.

The multi-dimensional nature of poverty and inequality is highlighted in this Report, contributing towards our understanding of how these different dimensions can be taken into account in mainstream policy design and review.

A transitional learning and capacity building period will be required so that the mechanics of equality/poverty proofing can be mastered as this work is developed. In the longer term poverty


and inequality issues should be addressed in mainstream policy as a matter of course. This is necessary if we are to work towards a more equal and poverty-free society.

► ACKNOWLEDGEMENTS

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June 2003

Introduction

This Report seeks to support approaches to policy making that involve both poverty proofing and equality proofing. It is inspired by the work of the social partners on equality proofing issues under the Partnership 2000 national agreement. This work was published under the title *Equality Proofing* by the Department of Justice, Equality and Law Reform.

Equality Proofing sets out a long-term vision for policy making where poverty proofing, equality proofing and gender mainstreaming would become integrated as a single process. It recommended a learning phase during the period of the Programme for Prosperity and Fairness national agreement. This learning phase would build an experience in equality proofing across the nine ground equality agenda. The nine grounds are those set out in the equality legislation – gender, marital status, family status, age, sexual orientation, disability, race, religion and membership of the Traveller community.

Equally the learning phase would develop a knowledge base to help develop an integrated proofing methodology covering poverty, gender and the wider equality agenda. This Report seeks to contribute to this knowledge base. It is the product of joint work by the Combat Poverty Agency and the Equality Authority and was recommended in the *Equality Proofing* publication.

The focus for this Report is the question on inequalities likely to lead to poverty that forms part of the poverty proofing process currently being implemented by policy makers. This question, with its focus on a number of the nine grounds, can be seen as a potential foundation point for

more integrated proofing processes.

However, the question on inequalities likely to lead to poverty has proved difficult to apply in the poverty proofing of policy making. This Report aims to support the effective application of this question. Experience can be developed in its application that will assist in shaping more integrated approaches to poverty and equality proofing.

The first step in enhancing a capacity to apply this question is to build a shared appreciation and understanding of the linkages between poverty and inequality – of the poverty/inequality interface. Part I seeks to address this challenge. It provides an insight into the theories and the concepts that shape an understanding of the poverty/inequality interface and that make the case for this focus to be given some priority.

The second step is to develop a methodology that will assist policy makers in deciding when and in relation to which group to apply this question on inequalities as part of their poverty proofing of a policy. The methodology recommended is based on characteristics identified for each group which would serve as trigger mechanisms.

Characteristics are identified in Part II of the Report under the grounds of age (for younger people and older people), gender (for women), disability (for people with disabilities), ethnicity (for Travellers and Black and other minority ethnic groups) and sexual orientation (for lesbians and gay men). These reflect the groups currently named in the poverty proofing Guidelines. Each characteristic

provides a check to assess the relevance of the policy to the situation of that particular group, its experience and expression of difference and, therefore, the need to include a focus on that group in the proofing process.

The third step in enhancing a capacity to apply the question on inequalities likely to lead to poverty is to develop a knowledge base on the identity, situation and experience of each of the different groups covered. Part II of this Report provides the foundations for this knowledge base. On foot of identifying the trigger characteristic for each group, a summary analysis is provided for that group on their experience of poverty and on the causal links between inequality and poverty. This analysis focuses on areas such as employment, education, housing and accommodation, health and personal safety. It is summary in nature and provides valuable reference to other sources of knowledge.

The methodology developed seeks to be simple and accessible. At the same time it seeks to avoid tokenism. It must be seen as the first stage in an evolving process where a capacity to poverty and equality proof can manage increasing levels of complexity.

This Report also holds a wider relevance. The development of more strategic approaches to poverty eradication such as the National Anti-Poverty Strategy and the European Union social inclusion process increasingly emphasise the linkages between poverty and inequality. Our evolving capacity to integrate and apply poverty proofing and equality proofing will serve to enhance the effectiveness of these recent policy developments.

Part I: Poverty and Equality

Ten reasons why anyone who wants to combat poverty should embrace equality as well

by JOHN BAKER,

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► INTRODUCTION

Many people believe that there is an important distinction between the issues of poverty and equality. They think that the alleviation of poverty is a more limited, attainable, justifiable and urgent aim than the promotion of equality. The two aims are not necessarily considered incompatible, but equality is seen as a secondary, remote and utopian project which can distract us from the serious business of eliminating poverty.

I argue below that there is no such need to distinguish between these two goals: that anyone serious about eliminating poverty should pursue a more ambitious egalitarian agenda. The first step is to say something very briefly about the concepts of poverty and equality. I then put forward ten arguments to show that anyone who wants to combat poverty should endorse equality as well. I conclude by considering some objections and outlining some implications for policy.¹⁰

► DIMENSIONS OF EQUALITY

Although there is a well known debate about the concept of poverty, we are in the relatively fortunate position here in Ireland of having a broad consensus on its definition. The consensus is expressed in the National Anti-Poverty Strategy (NAPS) like this:

“People are living in poverty if their income and resources (material, cultural and social) are so inadequate as to preclude them from having a standard of living which is regarded as acceptable by Irish society generally. As a result of inadequate income and resources people may be excluded and marginalised from participating in activities which are considered the norm for other people in society.”¹¹

That is the definition I employ below, although I return to its critics before concluding.

There is an equally extensive literature on the definition of equality, but no similar consensus in Ireland or elsewhere. In my view, equality has a number of inter-related but conceptually distinct dimensions. Quite how to characterise these is open to question and probably varies according to one's purposes, but for this discussion it is useful to distinguish five key dimensions of equality. They have to do with:

1. the egalitarian distribution of resources;
2. equality of opportunity;
3. equal respect and recognition;
4. equality in power relations;
5. equality in relations of care, love and solidarity.

Let me say a little about each of these in turn.¹²

The first idea is the egalitarian distribution of resources, or what might (with some reservations) be called **economic equality**. Economic equality is difficult to characterise. For a start, resources include not just income and wealth, but also access to public services. Moreover, an egalitarian distribution is not necessarily a strictly equal distribution. Everyone recognises that equality must pay attention to differences in need, implying that some people ought to have more resources than others. In addition, I would argue that an egalitarian distribution must also be sensitive to differences in work, so that people who work longer or harder are entitled to higher incomes, provided that these income differences do no more than compensate them for the extra burdens they have assumed. Regardless of these complications, I think we can safely

assume that an egalitarian distribution of resources would involve a much more equal distribution of income, wealth and access to public services than we have at the moment. The economic inequalities in Irish society are deeply unjust. That is the central idea to keep in mind for what follows.

Equal opportunity has a number of interpretations. Its most basic meaning is non-discrimination. If you have been barred from a pub because you are a Traveller, you have been denied equal opportunity in this first sense. A stronger idea, which the philosopher John Rawls calls "fair equality of opportunity", is the principle that people should not be advantaged or hurt by their social background, and that their prospects in life should depend entirely on their own effort and abilities.¹³ If you got a better education and ended up in a better job than other people because you came from a well off family, you have benefited from inequality of opportunity in this second sense. A still stronger view, which might be called equality of *real* options or *real* choices, means enabling everyone to develop their talents and abilities, and providing everyone with a real choice among activities that they find satisfying or fulfilling, including a range of combinations of paid and unpaid work. If you find yourself stuck in a meaningless, tedious job, you know what inequality of opportunity in this third sense involves. I refer to all three interpretations of equal opportunity below.

The idea of equal respect and recognition might also be called **cultural equality** or, more explicitly, "critical inter-culturalism". It is the principle that we should celebrate individual and cultural differences while at the same time engaging critically with others in an open and dialogical spirit, recognising that both our own cultural

assumptions and those of others are open to challenge. The person who openly despises Jews or Muslims is reinforcing cultural inequality. But so, too, are middle class people who feel superior about their own world view.

Equality of power - **political equality** - is a principle of radical democracy in all areas of society. It means, first of all, the promotion of a stronger, more participatory form of politics in which ordinary citizens, and particularly groups who have been excluded from power altogether, can have more control over decision making. Secondly, it means challenging power in other areas, such as the economy, the family, education and religion. The wife who resists a domineering husband, the child who stands up to an authoritarian teacher, and the worker who opposes the unreasonable dictates of management are all part of the struggle for equality of power.

A final key dimension of equality has to do with relations of love, care and solidarity. This idea of **affective equality** has not been thoroughly explored by egalitarian theorists, but it is a dimension that deserves more attention. Such relations matter profoundly to both individuals and society generally. If our society systematically makes it harder for some people than for others, to engage in relations of love, care and solidarity, that is a matter of social justice that ought to concern us.¹⁴

Having spelled out these five key dimensions of equality, my object in the next section can be expressed more precisely. It is to provide ten reasons for

believing that even if our primary aim is to eliminate poverty, we will achieve this better if we also work for real equality of opportunity, and for full economic, cultural, political and affective equality.¹³

DIMENSIONS OF EQUALITY: SUMMARY

Economic equality:

- *The egalitarian distribution of resources*

Equal opportunity:

- *Non-discrimination*
- *“Fair” equal opportunity*
- *Equality of real options*

Cultural equality:

- *Equal respect and recognition*

Political equality:

- *Equality in power relations*

Affective equality:

- *Equality in relations of care, love and solidarity*
-

► REASONS FOR CONNECTING POVERTY AND EQUALITY

Reason 1: Relieving poverty is intrinsically redistributive.

The first and most obvious connection between poverty and equality is that allocating resources to the relief of poverty necessarily means that poor people get more, and better off people less, than would otherwise be the case. We should not think of this as *taking* from the privileged some resources which are rightfully theirs, and *giving* them to the poor, since that implies that the privileged are entitled to those resources in the first place. But we should recognise that every anti-poverty action necessarily entails a greater equality of resources than would have occurred otherwise. To this extent, it is conceptually impossible to distinguish relieving poverty from promoting equality. At a national level, it is clear that the elimination of poverty would involve a very substantial increase in resources for, say, the poorest 20 per cent of the population, with correspondingly lower resources for the privileged. If we widen our vision to a global context, it is easy to see that the relief of world poverty would entail a massive increase in the resources of the poor, resources which would otherwise be appropriated by the well off.

Although this argument is important, it has a limited reach. It certainly shows that relieving poverty right away this week, this year, would require a much more equal distribution of resources. But it does not refute the claim that economic growth allows us to eliminate poverty over time without reducing inequality. To do so, we need to move to additional arguments.

Reason 2: The “poverty line” is a function of the overall inequality in society.

A second connection between poverty and equality has to do with the way poverty has been defined: in terms of the resources necessary for “a standard of living which is regarded as acceptable by Irish society generally” and for “participating in activities which are considered the norm for other people in society”. These very phrases suggest that poverty is a matter of distance from the average standard of living in society, even if it is not quite so simple as calculating straight percentages of income. It follows that there is a broad convergence between promoting equality and eliminating poverty, since both policies involve the narrowing of the gap between the worst off and the average.

Reason 3: Equal opportunity improves the prospects for working a way out of poverty.

It is widely accepted that for most people the best route out of poverty is through paid work. Although social welfare benefits or their equivalent, such as a guaranteed basic income, should lift people out of poverty, they are unlikely to provide more than a meagre standard of living that is at the margins of poverty. But people who are poor cannot work their way out of poverty unless they have the opportunities to do so. Those opportunities include both education and training, on the one hand, and prospects for employment on the other. To be sure, a certain amount can be accomplished in this regard without opportunities being anything like equal. People who are poor may be discriminated against; their schools and training facilities may be inferior; their prospects for decent and satisfying work may be far worse – all that

is consistent with some movement from welfare to work, as American experience in particular has clearly taught us.

But the greater the equality of opportunity, in all three of its meanings, the more likely it is that people who are poor will enter the workforce in a way that operates effectively against poverty in the long run. This is first of all a matter of equal access to work, since discrimination on the basis of gender, marital status, family status, sexual orientation, religion, age, disability, race or membership of the Traveller community, as well as on socio-economic status,¹⁶ often operates to keep people who are poor out of employment. It is secondly about fair equal opportunities for education, since the marginal, low-skilled jobs available to people with limited educational credentials are precisely those least likely to lift anyone out of poverty and who are most vulnerable to an economic downturn. It is, thirdly, about equality of real occupational choice, since the best way to get people into work is to offer them highly skilled, satisfying employment.

Another connection between poverty and equal opportunity is more political. The greater the degree of equal opportunity, the more likely it is that people from poor backgrounds will come to occupy positions in which they can significantly influence public policy. Not all of them will exercise a progressive influence, but it stands to reason that the greater the representation of people from poor backgrounds in the privileged sectors of society, the more attention will be given to the problems of poverty.

It follows that the relief of poverty, and in particular the effectiveness of welfare-to-work, depends on the degree to which we can achieve equal opportunity, with each form of equal opportunity adding to the prospects of success.

Reason 4: Equal opportunity depends on economic, cultural, political and affective equality.

If the relief of poverty depends on equality of opportunity, we need to ask what equal opportunity itself depends on. Like the distinction between poverty and equality, it is common enough to distinguish between equality of opportunity and what is sometimes called equality of outcome, and to prioritise the one over the other. But in this case, the interdependence is even more striking. It is abundantly clear to any careful observer that we will never have equal opportunity until we have a society which is much more equal economically, culturally, politically and affectively.

One reason for this is that the economically and culturally privileged will always find ways of advantaging their children in an unequal society. Whether it is through fee-paying schools, or the purchase of educational extras on the private market, or the direct transfer of academic skills within the family, or the provision of foreign travel, or networks of contacts in the economy, or any of the other advantages that privileged people are capable of passing on to their children, it is clear that equal opportunity is a myth in a context of massive inequality. It is, no doubt, a very useful myth – for those of us who are privileged! It means, for example, that we can use the points system to pretend that our children deserve their places in higher education and the idea of merit to pretend that they deserve their high paying jobs.

I am not blaming individual privileged people for their energetic defence of unequal opportunities. It is a perfectly rational strategy in an unequal society. After all, social mobility up entails social mobility down. And which of us, rich or poor, would voluntarily expose our children to the risk of poverty? This is, in

my view, the less obvious reason why equal opportunity is a myth in our kind of society: because inequality itself gives privileged people a compelling reason for ensuring that their own children have as great a prospect of success in life as they can possibly arrange. Inequality provides both the motive and the means for the privileged to sustain inequality of opportunity. It is no wonder that we use our economic, cultural and political advantages to do just that.

So far I have said little about affective equality, partly because we are far less familiar with patterns of inequality in this dimension. But we can surely say this much: that inequalities in people's access to relations of love, care and solidarity have got to have implications for their prospects of overall success in life. If we want equal opportunity in any robust form, we need also to pay attention to those affective inequalities which stand in its way.

If the relief of poverty requires greater equality of opportunity, and if this requires greater economic, cultural, political and affective equality, then the relief of poverty requires these as well. That is the fourth connection between poverty and equality.

Reason 5: The prospect of effective anti-poverty measures depends on greater equality of power.

Independently of the argument we have just considered, it is clear that inequalities of power play a crucial role in perpetuating poverty. At one level, this is as simple as the fact that people who are poor have much less influence on government than people who are rich. They are neither a cohesive nor effective

political force and have none of the bargaining power of the privileged in their dealings with the state. But as I pointed out earlier, powerlessness goes beyond the realm of formal politics. It appears in the legal system, where the poor face greater risks of imprisonment and its consequences for continuing poverty. It appears in the welfare system, where bureaucratic power can sometimes do more to reinforce poverty than to relieve it. It appears in the workplace, where the power of employers operates to keep people in low paid, dead-end, dangerous jobs. It appears in the educational system, where power operates to sustain the class structure of society. It appears in the family, where the power of men over women and of parents over children can sometimes work in a way that deepens the poverty of both women and children. It is no accident that we find greater poverty in all of the groups that are relatively powerless in society, including women, lesbians and gay men, children, older people, people with disabilities. Travellers, ethnic minorities and working class people.

It follows that if we are serious about the relief of poverty, we have to be serious about empowering marginalised groups – about fighting the inequalities of power which operate to keep people who are poor in their place.

Reason 6: The prospect of effective poverty relief depends on greater equality of respect and recognition.

The sixth connection between poverty and equality parallels and interacts with the issue of power. In our society, the lack of respect and recognition that the privileged have for people who are poor has many facets. One is stereotyping, the

belief that people who are poor have certain common, negative characteristics like laziness and lack of self-discipline. Another is cultural imperialism: the belief that the values and understandings of the privileged are right for everyone, and that such different values and understandings as are held by working class people, by Travellers, by immigrants, by lesbians and gay men, by people with disabilities – by anyone who is “different” – are to be disparaged, and educated out of them. A third facet is invisibility, the tendency of the privileged to act as though people who are poor simply do not exist, aided and abetted by isolating them geographically and ignoring them in the mass media. A fourth facet is internalised oppression, a lack of self respect and a feeling of isolation, alienation and uselessness among poor people themselves.¹⁷

It is easy to see that such cultural inequality operates to perpetuate and reinforce poverty. If the privileged cannot even see the poor, or if when they do see them can only despise and pity them, what chance is there that the voices of the poor will be heard, and heard accurately, by those in power? If people who are poor are treated as second class citizens and are stereotyped and disparaged, what chance is there that they will be permitted to participate in the activities others take for granted? If they are alienated from society, blame themselves for their condition and feel powerless to change it, what chance is there of any change at all? Without greater cultural equality, the prospects of a serious assault on poverty are bound to be weak. Thus the struggle against poverty has to be linked to the struggle for equal respect and recognition – for the acceptance and valuing of difference.

Reason 7: The more people care about equality, the more will be done to eliminate poverty. And the more unequal our society, the less people will care about either poverty or equality.

A seventh set of connections between poverty and equality operates through people's commitments and motivations. Reality can often fall short of expectations — whatever we aim for, we can end up achieving less. It follows that if we aim only at the relief of poverty, rather than at the more demanding goal of equality, we are likely to be less successful in achieving that very objective. If poverty relief alone is our goal, we are likely to be pretty happy about cutting the number of “consistently poor” people in half. But if equality is our goal, that target is going to look like a rather feeble first step.

A related reason for caring about equality and not just poverty is that our efforts are less likely to be sapped by disputes about what counts as poverty.¹⁸ If poverty relief is our goal, then the definition of poverty is obviously a crucial concern.

Governments will try to look good by defining poverty in a restricted way, while their critics will go for a more expansive definition. Of course, similar conflicts occur over the definition of equality, but they concern a higher target. Aiming at equality shifts the whole policy space upwards, in a way that is bound to be helpful to those who are poor.

A third aspect of this set of relationships has to do with the conditions for social solidarity. There is of course no simple relationship between public sentiment and social realities. The greater the degree of inequality in a society, the less the privileged are likely to care about either poverty or inequality. This is partly because such concerns raise serious doubts about the legitimacy of privilege, and so are deeply uncomfortable for privileged

people to entertain. It is also a matter of social distance and segregation, making it easier for people who are poor to be stereotyped and disparaged. Government policies which increase inequality strengthen the assumption that the privileged have no serious obligations to their fellow citizens – that the state has no right to transfer “their” money to the poor. Imagine, by contrast, an egalitarian society that is proud of its egalitarianism, in which political discourse taps into and fosters feelings of interdependence and solidarity. In that kind of society, support for the elimination of poverty and the promotion of equality would be a matter of course.

A society which wants to eliminate poverty will do a better job at doing so if it has a strong commitment to a wider egalitarian agenda, and that that commitment will itself be stronger in a more egalitarian society.

Reason 8: If poverty relief depends on growth, then it depends on greater equality.

It is widely believed that the relief of poverty depends on economic growth. Whether that belief is justified is open to question, for various reasons. One problem is that economic growth can merely shift the “poverty line” upwards, because it changes what is considered an acceptable standard of living. Another is that growth carries its own negative effects, such as environmental degradation and new forms of stress. But it is plausible to suppose that growth in some sense – particularly in the sense of increased productivity – can be helpful in relieving poverty. The question then arises of the relationship between growth and equality. For a long time it was assumed

by economists that growth depended on *inequality*. They assumed, for example, that inequality was necessary to provide the incentive for investment, technical innovation and hard work. There is now a growing body of evidence for alternative views: that economic growth is fostered by equality, or at least that growth relieves poverty more effectively in more equal societies.¹⁹ The reasons for these associations are no doubt complex, and open to debate. But if the relief of poverty does depend on growth, and if poverty-relieving growth does depend on greater equality, then there is an eighth connection between poverty and equality.

Reason 9: If the prospects for growth are limited, then poverty can only be relieved by greater equality.

Let us now consider the possibility that we are coming up against the limits to economic growth. These limits are most strongly evident in environmental constraints: in the depletion of fossil fuels, the problem of global warming, the dangers of nuclear power, the crisis in industrial agriculture and so on. In a no-growth economy, we would have to give up the belief that growth itself will eliminate poverty, that a rising tide will lift all boats.²⁰ There would then be no alternative to redistribution to pursuing greater equality. The eighth and ninth reasons together seem to cover all the options. If growth is possible and necessary for poverty relief, then we probably need greater equality. If growth is either impossible or unnecessary for poverty relief, then we definitely need greater equality.

Reason 10: The central arguments for eliminating poverty are arguments for equality.

We come now to my last connection between poverty and equality. It is that our reasons for deploring poverty are also reasons for the more radical agenda of equality. Why, after all, should we care about poverty? Because we recognise the value of every human being. Because we think that every person is entitled to a decent life. Because we feel compassion for, and solidarity with, others in need. But why should we limit these concerns to the elimination of poverty? Why should our empathy with others stop at the poverty line? Why should we think that the mere escape from poverty is enough of an aim for anyone's life? Is it enough for your own life, or for your own children's lives?

Of course the ending of poverty is a worthwhile aim, and an urgent one. But if the moral basis of resistance to poverty lies in the equal value of every human being and in our complex interconnections, then we have to recognise that this reasoning goes beyond the anti-poverty principle. It supports the stronger aim of equality.

**POVERTY AND EQUALITY:
SUMMARY**

- 1. Relieving poverty is intrinsically redistributive.**
- 2. The "poverty line" is a function of the overall inequality in society.**
- 3. Equal opportunity improves the prospects for working a way out of poverty.**
- 4. Equal opportunity depends on economic, cultural, political and affective equality.**
- 5. The prospect of effective anti-poverty measures depends on greater equality of power.**
- 6. The prospect of effective poverty relief depends on greater equality of respect and recognition.**
- 7. The more people care about equality, the more will be done to eliminate poverty. And the more unequal our society, the less people will care about either poverty or equality.**
- 8. If poverty relief depends on growth, then it depends on greater equality.**
- 9. If the prospects for growth are limited, then poverty can only be relieved by greater equality.**
- 10. The central arguments for eliminating poverty are arguments for equality.**

► COUNTER-ARGUMENTS

If there are ten reasons at least for linking poverty and equality, there are also some objections to doing so. In this section I focus on three of them.

Objection 1: “Poverty is not socially relative.”

The first objection is that the consensus definition of poverty is mistaken. Poverty is not a matter of what a society regards as acceptable and normal, but of basic, universal needs. On that account of so called “absolute” poverty, we can easily relieve poverty without any great commitment to equality.

This objection would work against my second reason for linking poverty and equality, but would have little impact on the others. It remains the case that a serious commitment to the relief of even “absolute” poverty on a world scale would involve a massive allocation of resources to the poor. More importantly, all the other reasons for connecting the relief of poverty to greater equality of opportunity and to greater economic, cultural, political and affective equality remain valid. So even if we were to concede the distinction between relative and absolute poverty, which we should not, it would have little impact on the argument.

Objection 2: “Experience shows that we can reduce poverty amidst increasing inequality.”

What may seem the easiest reply to my arguments is that however plausible they sound, they are refuted by the facts. In particular, we have in recent years witnessed both a decrease in Irish poverty and an increase in Irish inequality.

Part of the difficulty with this argument is that it depends on how the agreed idea of poverty is measured. Poverty has been going down according to the measure adopted by the NAPS global target, which includes basic deprivation, but it has been going up according to a simpler relative income measure of poverty.²¹ One of the questions which has already arisen in response to these facts is whether the list of basic deprivation indicators needs to be revised so that it continues to capture the agreed concept of poverty. But this is a familiar dispute. The other issues raised above are harder to sort out.

One aspect of the problem concerns the choice between relieving poverty now and postponing this till later. Even if it is true that economic growth has led to less poverty than we had in, say, 1971, that is not much solace to the people who were poor in 1971, half of whom are probably dead now. Poverty relief without redistribution is a delaying tactic that protects the rich at the expense of the poor.

Another consideration is that although Irish incomes have become more unequal,²² there has arguably been a decline in some other key inequalities. Most importantly, it can be argued that the development of social partnership and the inclusion of the community pillar in national negotiations have been small but real advances in political equality that have helped to counterbalance increased

economic inequality. In addition, partly as an effect of the economic boom and partly as a result of legislation, there has probably been a relative increase in the educational and employment opportunities open to people who are poor. It is hard to judge whether there has been any accompanying increase in cultural equality, but there are some indications that the dominant culture in Ireland has become a bit more tolerant.

At the same time, growing economic inequality in Ireland and globally seem to continue to inhibit rather than facilitate the relief of poverty. To take an obvious example, the resources which have been used to cut capital gains tax might have been used to reduce poverty instead. Moreover, greater economic inequality will eventually and inevitably worsen inequalities of opportunity, with attendant effects on the ability of people who are poor to work their way out of poverty and to influence state policy. We are also entitled to consider how the increase in economic inequality will affect people's commitment to social justice, as well as its impact on the prospects for continued economic growth.

We are a long way from eradicating poverty in Ireland. Although we have made a little progress, the evidence is far too weak to show that we can end poverty without tackling inequality. The case for linking poverty and equality remains strong.

Objection 3: "Eliminating poverty may require greater equality, but it does not require full equality."

A final objection to my arguments is that they purport to prove too much. Perhaps they do show that the struggle against poverty has to be linked to the pursuit of much more equality, but they do not show that we need anything like full equality.

I mention this objection only to accept it. It is doubtful that the elimination of poverty requires full equality: the arguments for equality have to go beyond what I have said here.²³ What I hope to have shown is that the relief of poverty requires much more equality than we have. If I have succeeded in that aim, I am happy to concede that these arguments alone do not prove the value of full equality.

▶ OBJECTIONS AND REPLIES: SUMMARY

OBJECTION	REPLY
"Poverty is not socially relative."	Even if true, applies to only one argument.
"Experience shows that we can reduce poverty amidst increasing inequality."	The evidence is questionable.
"Eliminating poverty may require <i>greater</i> equality, but it does not require <i>full</i> equality."	Fine. Let's have a lot more equality.

► IMPLICATIONS FOR ANTI-POVERTY POLICY

The reasons for linking poverty and equality have important implications for anti-poverty policy. For they show that anyone who believes in the eradication of poverty needs to embrace a wide range of policies for promoting economic, cultural, political and affective equality, as well as real equality of opportunity. In this section, I make some general observations about the shape such policies should take.

Poverty proofing implies equality proofing

For the last four years, the Irish government has been committed to poverty proofing, a process which involves assessing policies for their impact “on poverty and on inequalities which are likely to lead to poverty, with a view to poverty reduction”.²⁴ As we have seen, the inequalities which lead to poverty are wide-ranging. For example, policies which increase economic inequality, such as a cut in the top rate of income tax, have a negative impact on poverty even if accompanied by an increase in the incomes of the poor. If poverty proofing is to be taken seriously, then we need to engage in equality proofing, too, by analysing the effects of policies on economic, cultural, political and affective inequality, and on inequality of opportunity. An effective way of carrying out this equality proofing would be to analyse the effects of policies on inequalities structured around the key differences identified by our existing equality legislation: gender, marital status, family status, sexual orientation, religion, age, disability, race and membership of the Traveller community, as well as social class.

Different groups have different priorities

Equality does not mean treating everyone the same: it means treating people equally well. The nine types of social difference recognised by Irish equality legislation, together with social class, do not necessarily affect different groups in the same ways. To be sure, it is hard to think of any group liable to impoverishment that is not affected by inequalities of opportunity and economic, cultural, political and affective inequalities. But for some groups, such as working class people, it appears that economic inequalities play the most important role in creating and reinforcing their risk of poverty, while for others, such as Travellers, it seems that the most important inequalities generating poverty are cultural.²⁵ It is important to bear these differences in mind in designing effective egalitarian policies, relying on the participation of marginalised groups themselves.

The importance of political empowerment

I have argued that political inequality is a major factor in perpetuating poverty and other inequalities. Thus, an effective anti-poverty strategy has to include measures to challenge power inequalities, and in particular to empower marginalised and subordinate groups. That is why anti-poverty organisations should support political activity and not just the direct relief of deprivation.²⁶ It is why the specific inclusion of marginalised groups in local, regional and national decision making processes is vital, and why their participation should be properly resourced. It is why there is an urgent need to limit the role of private finance in the political system.

The need for ideological change

A fourth set of implications for anti-poverty policy concerns the need for ideological change. Our society seems to have a broad consensus on the importance of reducing poverty but no similar agreement on the value of equality. Yet my arguments imply that the absence of a commitment to equality is a major factor in the failure of our attempts to eliminate poverty. Ideological beliefs in the inherent inferiority of some social groups can easily override general platitudes about the evils of poverty. People who believe that they deserve their privileges can acknowledge that poverty is bad but retain an understanding that it requires nothing from them. They can deplore poverty in the same spirit in which they deplore the Irish climate or an earthquake in Nicaragua: it is a terrible thing but, sure, nothing can be done about it. If we are seriously opposed to poverty, and therefore need to be seriously committed to equality, then we must work to change these beliefs about social status, social justice and the possibilities of social change. We need to engage in a wide range of actions, including grassroots activism to challenge conventional beliefs, community education projects which allow their participants to think about and analyse poverty and equality, public campaigns against cultural and economic inequality, and academic research and its dissemination.

The need for structural change

A final implication of the arguments of this paper is that the elimination of poverty requires major changes in social structures. Poverty is not a matter of personal pathology which can be solved by curing those who are poor of their supposed inadequacies. It is a condition which is generated by structures of domination and oppression in our society and in the world more generally. Exactly how to name and analyse these structures and their interaction is a matter of continuing debate, but one way or another, they clearly include capitalism (a predominantly market-based economy in which the means of production are privately owned and controlled), patriarchy (systems of gender relationships which privilege men over women) and racism (social systems which divide people into "races" and privilege some "races" over others). They also include structures which systematically exclude and disable people with impairments from participating fully in their societies, structures which socially create a division between heterosexual and homosexual persons and privilege the former over the latter, structures which marginalise younger and older people, and systems which privilege dominant over subordinate ethnic groups. Thus, people and organisations dedicated to eliminating poverty need to devote some of their energies to imagining alternatives to these oppressive structures, and to supporting the changes necessary for achieving them.

► **IMPLICATIONS FOR ANTI-POVERTY POLICY: SUMMARY**

Poverty proofing implies equality proofing

Different groups have different priorities

The importance of political empowerment

The need for ideological change

The need for structural change

The links between poverty and equality imply that the poverty proofing to which the Irish government is committed entails a robust form of equality proofing, covering the key dimensions of equality. They also imply that differences among social groups should be reflected in egalitarian policies. This Report on inequalities likely to lead to poverty contributes to both of these aims.

It is important, however, to place the work of reports, conferences and agencies within a wider political context. If poverty is to be eradicated, it will be through a political movement which empowers subordinate groups, aims at ideological and structural change, and reflects both a commitment to equality and a deep anger at injustice. I hope I have helped to explain the need for that commitment to equality, and that in some small way I have contributed to that anger.

► **CONCLUSION**

The arguments above establish that the elimination of poverty requires a strong egalitarian programme of economic, political, cultural and affective equality and of equal opportunity. These arguments include the intrinsic connections between poverty and inequality, the relations between poverty, equal opportunity and other equalities, and the role of political and cultural inequality in perpetuating poverty. They also concern the effects of inequality on people's beliefs, the interactions of poverty, inequality and economic growth, and the basic moral principles that motivate our objections to poverty in the first place. The arguments stand up against three common objections.

Part II:

Applying the Question “Inequalities likely to lead to poverty” in the Poverty Proofing Guidelines

by TRACEY O'BRIEN,

based on research undertaken by NEXUS Research Co-operative

► INTRODUCTION

1.1 Background and context

The publication of the strategy statement *Sharing in Progress* in April 1997 marked the introduction of the National Anti-Poverty Strategy (NAPS).²⁷ NAPS set a ten year target for poverty reduction in Ireland and identified five key areas for consideration in tackling poverty: income adequacy, unemployment, educational disadvantage, urban concentrations of poverty and rural poverty. In accordance with a commitment in the national partnership agreement, the *Programme for Prosperity and Fairness* (2000-2002), the NAPS was reviewed in 2001 and includes updated targets for the original five themes, new targets on the additional themes of housing/accommodation and health, and new associated targets and actions on child poverty, women's poverty, older people, Travellers, migrants and members of Black and other minority ethnic groups, and people with disabilities.²⁸

The requirement to assess policies for their impact on poverty, known as *poverty proofing*, forms an integral part of the NAPS and was introduced in government departments in 1998. This requirement was referred to in the *Cabinet Handbook* which stated that memoranda for the government involving significant policy proposals should “indicate clearly the impact of the proposal on groups in poverty or at risk of falling into poverty in the case of significant policy proposals”.

A definition of poverty proofing

“The process by which government departments, local authorities and State agencies assess policies and programmes at design and review stages in relation to the likely impact that they will have or have had on poverty and on inequalities which are likely to lead to poverty with a view to poverty reduction.”²⁹

The poverty proofing process is supported by a set of Guidelines which include a series of questions on how to apply poverty proofing; see Appendix 1 for poverty proofing procedure. Question 4.5 of these guidelines requires policy makers to pay particular attention to *inequalities which may lead to poverty*. Examples given of the contexts in which such inequalities can arise include age, gender, disability, belonging to a minority ethnic community, membership of the Traveller community and sexual orientation. Inequalities arising within these contexts are now covered in the equality legislation³⁰ which includes the additional grounds of marital status, family status and religion.

Applying the question on “inequalities likely to lead to poverty” presents a significant challenge to the poverty proofing process. While considerable work has been undertaken in terms of raising awareness of inequalities, data limitations do not allow for a complete picture to be drawn on the generative causes of inequalities arising under each

of the nine grounds and the precise implications of these for the groups most affected.³¹ In this context, the link between inequalities and incidence and risk of poverty is not always clear. This makes it difficult to identify the broad policy areas that are most clearly relevant to addressing such inequalities and the type of poverty that might result.

Even where the general links between inequalities and poverty have been clearly established, effective poverty proofing will require a considerable refinement of the analysis with respect to the particular policy and inequality ground under review. With nine grounds to be considered, the challenge in applying the question across a wide range of policy areas is immediately apparent.

The effective application of the question on “inequalities likely to lead to poverty”, requires a full analysis of the poverty effects of inequalities arising under the equality grounds and the development of appropriate procedures, mechanisms and resources for refining this analysis to specific policy areas. In contributing to this longer term process of embedding an equality dimension into the poverty proofing process, this Report provides a set of “triggers” for applying the question in the shorter term, in the context of what is currently known of the interface between inequalities and poverty.

1.2 Approach taken to applying the question

The research undertaken as part of this work focused on the equality grounds identified in the poverty proofing Guidelines, i.e. age, gender, disability, ethnicity and sexual orientation, and

included consultations with various interests covering each of these areas (see Appendix 2).

The main objective of the consultations was to assist in identifying a set of key distinguishing characteristics which would have the greatest potential for *triggering* the most effective application of the question for each of the groups under consideration.

Identifying a characteristic of a whole social group is a challenging task. It involves reducing a complex identity and set of distinguishing characteristics to one core feature. There are a number of inherent problems in doing this. There is, for example, a danger of reinforcing rather than challenging existing stereotypes. It is also difficult to select a characteristic, no matter how kernel to the group in question, which would actually meet the requirements of the sectoral interests involved. There is therefore the possibility of division or the potential for some opposition to the use of the particular characteristic identified. Given these potential problems, it is important to note that this Report does not claim to identify the most important characteristic of the groups experiencing inequalities or to reach maximum agreement on what such characteristics could be. Rather, it identifies a characteristic which was suggested as central during the consultations and which appears to have maximum strategic value in reducing poverty within the current context of NAPS.

The characteristics identified are those with the potential for triggering a response from policy makers in terms of applying the poverty proofing question on “inequalities likely to lead to poverty”. They provide a simple test in assessing the

relevance of the policy area to particular groups experiencing inequality and in establishing the need for a specific focus on the group within the policy being proposed. In this way, the characteristics can be considered to be the first, rather than the ultimate, test in applying an equality dimension to poverty proofing.

In the light of these considerations, the consultation process for the study involved personnel in organisations associated with the different groups under consideration who were familiar with the strategic issues. A series of questions was asked with a view to identifying and testing the overall validity and usefulness of the characteristic. These questions were as follows:

1. Which social groups are affected by inequalities arising in the area of concern?
2. What characteristic typifies people in the area under consideration?
3. Which interpretations of the characteristic at societal or policy level lead to inequalities?
4. Which of the inequalities identified leads to poverty and how?

The application of these questions across the social groups under consideration provides the basis for the approach devised in this Report.

1.3 Structure of Part II

Part II of this Report provides practical information on how to apply the question on “inequalities likely to lead to poverty” in the poverty proofing Guidelines. The areas of age, gender, disability, ethnicity and sexual orientation are considered in separate sections of the Report and include characteristics (or triggers) for the following groups:

- younger people
- older people
- gender (for women)
- people with disabilities
- Travellers
- Black and other minority ethnic groups
- lesbians and gay men

Based on the characteristics developed for each of these groups, the Report identifies some of the broad policy areas in which the links between inequalities and incidence and risk of poverty are evident. These are presented under a number of different categories including:

- employment
- education
- training
- housing and accommodation
- health
- income

- financial support
- tax and social welfare
- social participation
- partnership rights
- personal safety

The nature and type of categories used vary from section to section, depending on the group under consideration and the type of information available.

▶ AGE

2.1 Introduction

This section of the Report is concerned with inequalities and poverty arising for people of different ages. It is specifically focussed on the most vulnerable age groups, i.e. younger people and older people.

2.2 Younger people

For the purpose of this exercise, younger people are defined as those under 18 years of age. According to the 1996 Census, there are 1,071,972 people under 18 years of age in Ireland. Forty-three per cent of Irish households include a least one child, making Ireland the country with the highest percentage of households with children in the European Union.³²

Changes in the labour market have seen an increase in women's participation in the workforce. However, they have also seen an increase in the number of young people in employment. Figures show that 16 per cent of children between 15 and 17 years of age are engaged in the labour market and that almost 31 per cent of them are working full time.³³ These changes are affecting young people in a variety of ways. The National Children's Strategy notes, for example, that an increasing number of children are seeking independence at an earlier age and are negotiating new and varied freedoms with their parents.³⁴ Despite these changes, however, children and young people remain at a stage of accelerated learning and formation, particularly in early years, and are more socially and economically dependent than those in other age groups. The transition to

adulthood is therefore difficult for many young people as they learn to cope with their environment and begin to make important decisions concerning various aspects of their life.

2.3 Characteristic: younger people

To take account of the issues outlined above, the following characteristic is proposed:

“Children and young people are in a learning phase of life and in the younger years, are more economically dependent than adults.”

2.4 Applying the question

To apply the question on inequalities likely to lead to poverty for younger people, the following steps should be taken.

1. Assess the policy or programme being proofed against the characteristic above by asking:
 - Does the policy or programme have a particular relevance for younger people?
 - Does the characteristic suggest the need for a specific focus on younger people in the design and delivery of this policy or programme?
2. If the answers to step one are yes:
 - Identify from the text in 2.5 and 2.6 below what knowledge is required and where this knowledge can be sourced to ensure that the design and delivery of this policy or

programme take account of the specific identity, situation and experience of younger people.

3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on younger people. Then explore adjustments that could be made to maximise the benefits or outcomes for younger people from the policy or programme .

2.5 How is this characteristic linked to inequality?

Many children and young people experience multiple forms of inequalities, including those with disabilities, those who are homeless and those who are members of the Traveller community or other minority ethnic groups. The UN Convention on the Rights of the Child provides an internationally agreed framework of minimum standards necessary for the well being of every child. One of the underlying principles of the Convention is that children should be protected from discrimination irrespective of their social or other status. The achievement of this objective involves addressing the inequalities experienced by children and young people in many areas of their lives. Some of these arise in the following areas.

Financial Support

- In recent years, child income support has fallen behind the rise in average incomes.³⁵ Although child benefit rates have increased, the combined value of child support for welfare families (i.e. child dependent allowances and child benefit) has not kept pace with increases in earnings and remains below the basic cost of rearing a child.³⁶ Child dependent allowances and child benefit also do not take into account the age related costs of children, despite evidence to show that children become more expensive to support as they get older.³⁷
- The problems for both parents and children in Ireland are exacerbated by limitations in available and affordable child care.³⁸

Education

- Many young people experience difficulties in the education system arising from socio-economic factors and inequalities in its structure and delivery. These include inadequate income and poor housing conditions, the costs associated with participation in education and a lack of resources to adequately meet the needs of young people with learning difficulties.³⁹
- Research has shown that the lack of resources or the allocation of resources within the family can have a negative effect on a child's ability to perform well in school.⁴⁰

Housing/homelessness

- Not all children and young people have accommodation which is suitable for their needs. This is particularly the case for children whose parents/guardians cannot afford adequate housing.
- There is an increased risk of homelessness for children whose relationships with their parents/guardians break down, many of whom do not have sufficient resources of their own to secure accommodation.
- Although the nature, causes and extent of youth homelessness are largely unexplored, there is evidence to show that Traveller children and young people who have spent time in care are disproportionately represented in homeless figures.⁴¹

Health

- Access to many public health care services is means tested. This is problematic for some families on low incomes, particularly those who fail to qualify for a medical card. There is evidence to suggest that existing medical card income thresholds penalise families with children.⁴²
- It has been shown that physical exercise and activity have a positive impact on children's health and well being.⁴³ However, not all children have access to the facilities necessary to engage in physical and leisure activity, particularly those living in disadvantaged and underdeveloped areas.

Social participation

- Recreational and cultural activities support children's development, as well as their future health and well being.⁴⁴ However, such access is generally influenced by their family's status, with greater access available to children from higher socio-economic backgrounds.

2.6 How are these inequalities likely to lead to poverty?

Child poverty impacts on the life chances of many children by contributing to a cycle of deprivation and social exclusion.⁴⁵ The revised NAPS (*Building an Inclusive Society*, 2002) and the National Children's Strategy (introduced in November 2000) include the overall objective of eliminating child poverty and achieving greater equality for all children in terms of access to education, health and housing.⁴⁶ The risk for children and young people of becoming and remaining poor as a result of the inequalities highlighted above is most evident in respect of the following.

Financial Support

- Financial inequalities experienced by children may prevent them from having an acceptable standard of living. Much research has been undertaken on children's experiences of poverty and has shown there is a higher risk of poverty for families with children compared with households comprising no children.⁴⁷
- In recent years families on welfare have seen their position worsen relative to others in society. This is particularly true for families comprising older children, for whom the risk of poverty is high.⁴⁸
- Children in families dependent on welfare payments have a particularly high risk of poverty.⁴⁹

- Lack of affordable child care for families on low incomes exacerbates problems associated with poverty and social exclusion for both parents and their children.⁵⁰
- Poverty has strong implications for a child's future life chances. The longer a child is poor, the greater the subsequent deprivation in later life.⁵¹

Education

- The inequalities for children in education can impact negatively on their future living conditions and standards. Educational disadvantage is a key factor in preventing children from participating fully in their communities and society and increases their chances of homelessness, unemployment and lone parenthood.⁵²

Housing/homelessness

- Poverty and lack of affordable housing have given rise to homelessness among many families. This can result in some families entering into a cycle of homelessness for lengthy periods.⁵³ The long term repercussions of this for children are highlighted by recent research which shows that many adults who are homeless have experienced homelessness as a child.⁵⁴
- Inequalities in housing and accommodation provision can have numerous adverse affects on children. Research has established, for example, that there is a strong relationship between homeless children and histories of incomplete vaccinations, poor nutrition, underdeveloped weight and height growth, and mental and emotional distress.⁵⁵ These problems can have numerous long term effects.

Health

- Healthy eating habits among children are linked to the socio-economic class of their parents with children from less well off backgrounds tending to have poorer diets than those from better off backgrounds.⁵⁶
- Children from poor backgrounds are at increased risk of ill health arising from problems associated with inadequate and damp housing, dangerous surroundings, poor diet and stress.

Social participation

- Many families on low incomes experience difficulties in acquiring affordable sport and leisure activities. Children from disadvantaged areas participate in such activities less often than children who are financially better off.⁵⁷ Lower levels of social participation in childhood can contribute to isolation in adulthood and in turn to reduced levels of access to a variety of services and opportunities, including those related to further education, training and employment.

2.7 Older people

Policy and provision for older people in Ireland generally refer to two distinct categories: those aged 50 to 65 years and those over 65 years. The 65+ age group, to which much of existing literature on older people refers, includes older people over the usual upper retirement and pension age. In terms of the labour market, 50+ is the commonly used reference point for older workers.⁵⁸ Given the existing literature, most references to older people in this text relate to those aged 65+ unless otherwise stated.

There are almost a million people aged 50+ in Ireland, or 26 per cent of the

population. There are approximately 429,100 persons aged 65 years and over, making up just over 11 per cent of the total estimated population of 3,838,900.⁵⁹ Demographic projections suggest that the number of older people in Ireland is likely to increase over the next 10 years and to reach about 14 per cent of the general population in 2011.⁶⁰ About a quarter (26 per cent) of all older people in Ireland live alone, with a very small proportion (5 per cent) residing in long stay care institutions.⁶¹ While the vast majority of older people live in owner occupied dwellings and without a loan or mortgage, research has shown that older people are particularly vulnerable to lower quality housing arising from dampness and/or structural problems.⁶²

There is no set legal age at which a person must retire in Ireland, although the vast majority of employment institutions include a retirement age of between 65 and 66 years (the two main ages at which social welfare payments become available). In overall terms, however, only a small proportion of people aged 65 years and over remain in employment. Recent trends also show increasing levels of retirement among people before 65 years, arising primarily from ill health or redundancy.⁶³ However, regardless of the particular age of retirement, many people experience significant reductions in their living standards on leaving employment with the majority of income in old age being drawn from a social welfare pension or allowance.

The increase in risk and incidence of health problems and the transition into dependency are important determinants of the quality of life of older people.⁶⁴ It has been shown, for example, that rates of chronic illness are three times higher for people aged over 65 than for those aged under 30.⁶⁵ Research has also shown that a high number of older people

experience mobility problems⁶⁶ which, along with reduced income, seriously impact on their ability to carry out usual activities and to access the services necessary to maintain a healthy and fulfilling lifestyle.

2.8 Characteristic: older people

To take account of the issues outlined above, the following characteristic is proposed.

“Older people are moving towards the latter phase of their working lives and may experience a reduction in their level of income and diminished access to services.”

2.9 Applying the question

To apply the question on inequalities likely to lead to poverty for older people, the following steps should be taken.

1. Assess the policy or programme being proofed against the characteristic by asking:

- Does the policy or programme have a particular relevance for older people?
- Does the characteristic suggest the need for a specific focus on older people in the design and delivery of this policy or programme?

2. If the answers to step 1 are yes:

- Identify from the text in 2.10 and 2.11 below, what knowledge is required and where this knowledge can be sourced to ensure the design and delivery of this programme takes account of the specific identity, situation and experience of older people.

3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on older people. Then explore adjustments that could be made to maximise the benefits or outcomes for older people from the policy or programme.

2.10 How is this characteristic linked to inequality

A person's age is all too often mistakenly taken as an indication of his or her capacity to fulfil particular economic and social roles. It is sometimes assumed, for example, that all older people are sick and frail and that they are therefore unable to benefit from certain types of services and provisions. This type of labelling both perpetuates and creates discrimination against older people in Irish society. Some of the inequalities arising for older people are evident in the following areas.

Income

- The absolute income levels of older people are lower than the population in general. This is primarily due to retirement which, for most older people, significantly reduces their income. Many older people also become dependant on various pensions for most of their income,⁶⁷ many of which fall considerably short of what is required to maintain an adequate standard of living.
- Older people's incomes tend to be derived from a more limited range of sources, primarily social welfare and occupational pensions.⁶⁸
- Many older people experience additional financial pressures arising from illness and/or the death of a spouse or companion.⁶⁹

Employment

- Older people who are below retirement age (i.e. between 50 and 65 years of age) are at a higher risk of being discriminated against in recruitment processes than younger people. Many people aged as young as 50 are reporting difficulties in being called for interview and in securing employment.⁷⁰
- While the Employment Equality Act (1998) seeks to eliminate discrimination on the grounds of age, it does not extend to people aged 65 and over.
- The continuance of enforced early retirement in many organisations has inhibited the development of a more flexible system of retirement for older people, including phased retirement involving a gradual reduction in the number of hours spent in work.⁷¹

Housing

- Housing disadvantage or deprivation is more common among older people.⁷² Poor quality housing increases older people's vulnerability to such problems as accidents, ill health and crime.
- Many older people live in houses that are no longer suitable to meet their needs even though they may be worth significant amounts of money.⁷³

Health

- Older people have very uneven access to health services in Ireland.⁷⁴ This is due to a range of factors, including a lack of co-ordination between the health boards and local authorities, inadequate income, variations in waiting times, poor transportation, and a lack of information about service availability.⁷⁵

- There is considerable variation from area to area in terms of the extent to which community based care (e.g. home help, meals on wheels and day care centres) is provided.⁷⁶ This places some older people who are in need of such support at considerable disadvantage in comparison to people living in communities where such services are readily available.
- Inequalities in medical card provision mean that some older people who are just above the current income eligibility guidelines are denied entitlement. While all those aged 70 and over are now entitled to the medical card,⁷⁷ recent studies show that approximately 30 per cent of people aged 65 and over do not have access to it.

Social participation

- Retirement contributes to social exclusion among some older people by bringing about a very quick change in the pace of life and a significant decline in regular social contact.⁷⁸
- There has been a decline in family and non-family formal care and support for older people in urban areas. This has contributed to increased levels of vulnerability and loneliness among older people.⁷⁹
- Older people living in areas where transport is infrequent or non-existent face particular disadvantages in accessing services, participating in social activities, and maintaining their independence.⁸⁰

2.11 How are these inequalities likely to lead to poverty?

Research conducted by the ESRI (Economic and Social Research Institute) for the National Council on Ageing and Older People highlights the relatively high risks of poverty and deprivation among older people.⁸¹ Older people are specifically mentioned in the revised NAPS (*Building an Inclusive Society*, 2002) which includes the overall objective of eliminating consistent poverty for older people. It also highlights the importance of improving their access to health and housing and of supporting them to live independent lives. The links between inequalities and poverty for older people can be seen in the following areas.

Income

- Between 1994 and 1998 the rate of relative income poverty of those aged 65 and over increased sharply.⁸² A significant factor in this is that social welfare rates have not kept pace with average incomes.
- Older people on non-contributory pensions and widow's pensions are at an increased risk of poverty.⁸³
- Reduced levels of income in old age can contribute to deprivation in housing quality, clothing, and nutrition.⁸⁴
- Owning their own homes does not necessarily improve older people's incomes. Thus, while many older people may be "asset rich", some remain "income poor".⁸⁵

Employment

- The absence of a flexible system of retirement renders it difficult for many older people to adequately adjust to the changes retirement brings about, including a sharp reduction in the pace of life, lower

levels of income and an increased risk of poverty.⁸⁶

- Older people find it more difficult to access the labour market after a period of unemployment than younger people⁸⁷ and because of this, many are restricted to living on welfare payments which are sometimes inadequate.

Housing

- While 80 per cent of older people own their homes, many of these live in inadequate accommodation.⁸⁸ Because a large number live on a fixed income, many are unable to pay the cost of altering their home to meet their specific needs, including those who are home owners.⁸⁹

Health

- For some older people (under 70 years), not having a medical card represents a significant additional cost, particularly for those living on low incomes but just above the medical card income thresholds. It has been shown that older people without a medical card visit their general practitioner services considerably less often than those with a medical card.⁹⁰ The higher health costs for older people without medical cards therefore contribute to reduced income levels and in turn to higher risks of poverty.

Social participation

- Inequalities in service provision contribute to social exclusion amongst older people by denying them access to the resources necessary to enhance their economic, social and cultural development.

► GENDER

3.1 Introduction

The position of women relative to men in Irish society has changed markedly over the last 30 years. More women are now active in the labour market and are making increased contributions to the economy through paid labour as well as through unpaid work in the home.

However, gender inequalities persist in a number of areas critical to women's economic and social well being, including in the home, the welfare system and the workplace. A number of factors inhibit the full participation of women, in particular low wages, limited child care, lower levels of access to training, underdeveloped family friendly employment practices, and disincentives arising from structural inequalities in the tax and social welfare systems.⁹¹

Caring and family responsibilities are also often carried by women and in particular, mothers. Women generally have primary responsibility for child care and care of other family members which restricts their capacity for full participation in social, economic and political life and can restrict them to part time and low paid work.⁹² This remains so despite a growing involvement by men in caring roles. The position of women in society is also affected by their dependent economic status. This is evidenced in the Irish tax and welfare systems which are based on a male bread winner model.⁹³ Dependency has numerous negative outcomes for women, including having no income in their own right, facing disincentives on taking up work and having limited opportunities for continuing training.

3.2 Characteristic: women

To take account of the issues outlined above, the following characteristic is proposed.

"Women have traditionally been more economically dependent than men. They now play multiple roles while continuing to have primary responsibility for care."

3.3 Applying the question

To apply the question on inequalities likely to lead to poverty for *women*, the following steps should be taken.

1. Assess the policy or programme being proofed against the characteristic above by asking:
 - Does the policy or programme have a particular relevance to women?
 - Does the characteristic suggest the need for a specific focus on women in the design and delivery of this policy or programme?
2. If the answers to step one are yes:
 - Identify from the text in 3.4 and 3.5 below what knowledge is required and where this knowledge can be sourced to ensure that the design and delivery of this policy or programme take account of the specific identity, situation and experience of women.
3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on women. Then explore adjustments that could be made to maximize the

benefits or outcomes for women from the policy or programme.

3.4 How is this characteristic linked to inequality?

Many women are involved in full time work in the home and are without an earned income of their own. When women are employed, they tend to earn less than men, have lower level jobs and may experience discrimination because they are women. Added to these difficulties is responsibility for household management and care of family members which, as indicated above, is generally carried out by women. Tackling poverty among women therefore requires measures to address inequalities in access to resources between men and women. These inequalities are reflected in the following areas.

Tax and social welfare

- The Irish tax and social welfare system includes structural inequalities which emphasise the male role as the breadwinner and the female role as the homemaker.⁹⁴
- Women married to or living with men claiming social welfare are generally considered to be their dependants and the payments received by women often come as part of a joint payment or as a separate payment for a qualified adult.⁹⁵ Women on welfare are therefore not automatically entitled to receive an income on an individual basis.

Employment

- There are currently a number of restrictions facing women who take up work. These include disincentives in the tax/social welfare systems, low

wages, limited availability and cost of child care and care of older people, and limited opportunities for training.⁹⁶

- The increasing numbers of women entering the labour market have not been matched by a corresponding change in the division of labour in the home. Thus, on taking up employment, many women retain the same level of responsibility for housework and care of family members.⁹⁷
- Family friendly employment policies are often either lacking or underdeveloped. This can give rise to an inflexible work environment for women who find it difficult to balance work with caring responsibilities.⁹⁸

Education and training

- Education and training provision in Ireland has been critiqued for not responding to the differing requirements of men and women. In particular, there is a limited response to the specific social, cultural and economic needs of women, especially those who are mothers, carers and family members.⁹⁹
- Limited child care supports and flexible education and training provisions represent major obstacles for women interested in developing their skills and qualifications.¹⁰⁰
- Lack of reliable and affordable child care limits access to educational and training opportunities for some mothers, particularly lone mothers seeking employment.¹⁰¹

Health

- Inequalities in existing service provision compromise the health and well being of many women in Irish society. Some women forego health

care because of a lack of access to a GP and home help services, difficulties in travelling long distances to clinics and hospitals and high travel costs associated with meeting health related appointments.¹⁰²

- Lack of access to appropriate health information, advice, support and/or preventive services can represent additional barriers to women's health and well being.¹⁰³

Social participation

- Gender inequalities present a number of obstacles to social participation for women. These generally result from child rearing, family responsibilities and economic dependence.¹⁰⁴

3.5 How are these inequalities likely to lead to poverty?

Research has shown that the burden of poverty often falls more heavily on women than men.¹⁰⁵ Women are at a higher overall risk of poverty than men, with households headed by someone working full time in the home representing one of the largest income poverty groups.¹⁰⁶ The causes of poverty among women arise principally from women's dependent economic status, whether in the home, the welfare system or the workforce. There is also a diversity of experiences of poverty among different categories of women, including those caring for children or other dependants on their own, lone mothers, women in low paid employment, minority ethnic women including Travellers, and older women. Women are identified as a priority group in the revised NAPS (*Building an Inclusive Society*, 2002) which includes the objectives of eliminating consistent

poverty for women and improving access for women to health care, education and employment.¹⁰⁷ The overlapping dimensions of inequality, gender and poverty include the following.

Tax and social welfare

- Lack of an independent income and dependence on social welfare are both clear causes of poverty. In the case of married women, for example, inequalities in the Irish tax and social welfare system contribute to poverty by denying them an income in their own right and creating financial disincentives on taking up work.¹⁰⁸

Employment

- Many women work full time in the home and are therefore without an earned income of their own.¹⁰⁹ However, when women are employed, they tend to earn less than men and to work in both lower level and lower paying jobs.¹¹⁰
- A higher proportion of women than men are in part time employment where the risk of being low paid is higher than for full time workers.¹¹¹
- Arising from limited family friendly policies, women find it more difficult than men to remain in paid work and to improve their labour market performance in terms of pay and promotional opportunities.¹¹²

Education and training

- Young women who leave school early as a result of its failure to meet their needs are at a greater risk of unemployment or low paid work than their male counterparts. Thus, while young women are less likely than young men to leave school early, the economic consequences

are more severe for the ones that do.¹¹³

- Women with limited educational qualifications are more likely than men not to enter the labour market. If employed, they are more likely to be engaged in low paid and part time work.¹¹⁴
- Young single mothers who do not access appropriate education and/or training relatively soon after leaving school early, face serious disadvantage and are at a high risk of poverty.¹¹⁵

Health

- For many women, foregoing health care as a result of inadequate and costly services can increase their risk of poverty by, for example, reducing their capacity to participate effectively in the labour market. Once in poverty, more women than men bear the brunt of health problems related to poverty.¹¹⁶ It has been shown, for example, that many mothers managing on low incomes reduce their food intake to ensure that their children have an adequate diet.¹¹⁷

Social participation

- Lower levels of social participation among women can lead to narrower social networks and therefore to fewer prospects of employment and other progression opportunities. Lack of social support networks can also often exacerbate the effects of poverty for women.¹¹⁸

► DISABILITY

4.1 Introduction

There is a dearth of research data on the situation of people with disabilities in Ireland. However, the Commission on the Status of People with Disabilities (1996) estimated that around 10 per cent of the Irish population have a disability and that half of all those with disabilities are aged 60 and over.¹¹⁹ Recent data from the CSO (Central Statistics Office) show that over 10 per cent (271,000) of persons of working age (15-64) indicated that they had a long-standing health problem or disability.

People with disabilities are at a particularly high risk of inequality and poverty arising from underdeveloped economic and social policies, poor public attitudes and low levels of public and professional awareness of their particular needs and concerns. In *A Strategy for Equality*, the Commission on the Status of People with Disabilities noted that “public attitudes towards disability are still based on charity rather than on rights, and the odds are stacked against people with disabilities at every turn.”¹²⁰

Growing recognition that disability is an issue of social disadvantage rather than medical need has improved the situation for people with disabilities to some degree. The Employment Equality Act (1998) takes further steps by outlawing discrimination against people with disabilities in relation to employment, training, work experience, conditions of employment and promotion. The Equal Status Act (2000) prohibits discrimination against people with disabilities in the provision of goods and services, education and accommodation, with some exceptions. Both acts include a valuable positive duty to accommodate people

with disabilities by making adjustments and providing special facilities within a nominal cost limit. This was further supported by the national agreement, the *Programme for Prosperity and Fairness*,¹²¹ which included a commitment to achieve a 3 per cent target by 2002 for the employment of people with disabilities in the public sector.¹²² However, such positive-led action does not extend to all areas critical to the social, cultural, economic and physical well being of people with disabilities and exclusions still exist.

4.2 Characteristic: people with disabilities

To take account of the issues outlined above, the following characteristic is proposed.

“People with disabilities are operating within a disabling social, cultural, economic and physical environment. They also have diverse needs, based upon diverse levels and types of impairment.”

4.3 Applying the question

To apply the question on inequalities likely to lead to poverty for people with disabilities, the following steps should be taken.

1. Assess the policy or programme being proofed against the characteristic above by asking:
 - Does the policy or programme have a particular relevance to people with disabilities?
 - Does the characteristic suggest the need for a specific focus on people with disabilities in the design and delivery of this policy or programme?

2. If the answers to step one are yes:

- Identify from the text in 4.4 and 4.5 below what knowledge is required and where this knowledge can be sourced to ensure that the design and delivery of this policy or programme take account of the specific identity, situation and experience of people with disabilities.
3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on people with disabilities. Then explore adjustments that could be made to maximise the benefits or outcomes for people with disabilities from the policy or programme.

4.4 How is this characteristic linked to inequality?

Failure to take account of the diverse needs of people with disabilities has contributed to inequalities in a range of policy fields, including access to resources and provisions, education, training, employment, health and social participation.

Resources and provisions

- The built environment is largely inaccessible to many people with disabilities and limits their mobility, participation and opportunities for development. In particular, public transportation is largely inaccessible and compounds problems associated with access to education, training and work opportunities.¹²³
- State allowances for people with disabilities do not include disability related costs which differ according to the type and severity of disability.

These include the costs of higher insurance premiums, special dietary or heating requirements, aids and adaptations and healthcare.¹²⁴

- The lack of information available to people with disabilities and their carers gives rise to difficulties in accessing entitlements and services, both public and private, and adds to the isolation of those coping with disabilities.¹²⁵

Education

- The diverse needs and requirements of people with disabilities are often not met by the mainstream education system. This has a number of consequences for people with disabilities and severely limits their capacity to access training and employment opportunities.¹²⁶
- People with disabilities face added difficulties in education arising from limited information on educational options and entitlements and a lack of resources to address particular needs. Inequalities also arise from poor levels of awareness about disability issues, negative stereotyping of people with disabilities and a lack of appropriate curricula to meet individual requirements.¹²⁷

Training and employment

- People with disabilities often have higher costs (e.g. transport and insurance costs) on taking up training and work than people without disabilities.¹²⁸
- Employment provision significantly disadvantages certain categories of people with disabilities. For example, people who acquire a disability in the course of employment receive higher allowances than those who have been disabled from birth.¹²⁹

- Training and employment recruitment practices can, in some cases, result in the exclusion of people with disabilities through misconceptions, misinformation and stereotyping, and through discrimination and inappropriate approaches to health and safety, insurance and workplace support issues.¹³⁰

Health

- The built environment in which health services are delivered can impact negatively on people with disabilities. This problem is often exacerbated by a lack of knowledge and understanding on the part of staff of their particular needs and requirements.¹³¹
- Failure to take account of the costs of disability has serious consequences for the health and well being of people with disabilities who are living on low incomes. This is particularly true for those who are unable to meet the financial costs associated with certain aids, adaptations and medicines.¹³²

Social participation

- Inaccessible buildings and services, as well as a lack of sensitivity and awareness by others, often excludes people with disabilities from interaction and participation in a wide variety of social and recreational settings.¹³³

4.5 How are these inequalities likely to lead to poverty?

Recent research on income poverty in Ireland highlights the strong link between poverty and disability and shows that households headed by someone who is ill or a person with a disability experience a very high risk of poverty.¹³⁴ Poverty is

experienced by a proportion of all groups who are disabled, including people with learning difficulties, people who are mentally ill and people with physical, sensory and intellectual impairments.¹³⁵ People with disabilities are prioritised in the revised NAPS, *Building an Inclusive Society*, (2002), which includes a commitment to increase their participation in work and in society generally and to support them and their families to lead full and independent lives.¹³⁶ The links between the inequalities outlined above and poverty for people with disabilities are as follows.

Resources and provisions

- Having to meet the extra costs associated with disability, including hospital and medical expenses, increases income poverty in the short term and prevents people with disabilities from realising opportunities in the longer term.¹³⁷ This can lead to the cost of disability becoming an even more formidable barrier to accessing basic services and provision, including transportation, information and the supports necessary for progression.

Education

- Inequalities in the education system have given rise to lower levels of participation by people with disabilities in education in comparison with the wider population.¹³⁸
- Lower qualifications arising from difficulties in education lead to limited employment opportunities and poor quality jobs. These in turn lead to lower incomes and an increased risk of poverty.¹³⁹

Training and employment

- Failure to meet the particular training and employment needs of people with disabilities contributes to low labour market participation and to unemployment. Recent data from the Quarterly National Household Survey shows that among the working age population (15-64) 40 per cent of people with disabilities were in employment, compared to 68 per cent of the non-disabled. In addition, people with disabilities had a higher rate of unemployment (6.5 per cent) than the non-disabled (4.2 per cent).¹⁴⁰
- Many people with disabilities who are employed are in low paid jobs with few opportunities for promotion.¹⁴¹

Health

- Ill health and disability can result in a high risk of poverty. Recent data shows, for example, that households where the head of household is ill or disabled have a 54 per cent risk of poverty compared to a general risk of 22 per cent for all households.¹⁴²
- Having to meet the financial costs associated with disability often exacerbates the living conditions of people with disabilities on low incomes. Previous research revealed that while a significant number of people with disabilities knew of equipment which would improve their lives, the majority could not afford it.¹⁴³

Social participation

- Inaccessible buildings and services often exclude people with disabilities from routine interaction and participation in society. This contributes to limited social networks among people with disabilities and denies them mobility, participation and opportunity.

► ETHNICITY

5.1 Introduction

There is a lack of data on the socio-economic position of minority ethnic groups in Ireland and much of the data that is available relates only to the Traveller community. However, there is a growing body of knowledge to suggest that minority ethnic groups in Ireland experience widespread racism and discrimination. Racism directly compromises people's ability to access and benefit from resource distribution systems and structures and may directly or indirectly contribute to inequalities and poverty. This section is concerned with ethnicity and racism and raises issues concerning Travellers and Black and other minority ethnic groups.

5.2 Travellers

Travellers are widely acknowledged as one of the most marginalised and disadvantaged groups in Irish society. It is estimated that there are about 4,000 Traveller families in Ireland which include approximately 25,000 people.¹⁴⁴ Reliable data has not been collected on the Traveller community which makes it difficult to assess their circumstances and any progress in their situation.

The history of the Traveller community includes a struggle to uphold its distinct cultural identity and to maintain a nomadic way of life.¹⁴⁵ The importance of the extended family, the Traveller language, Traveller nomadism and the structure of the Traveller economy also provide tangible markers of their distinct Traveller culture.

Low levels of acceptance by settled people for Travellers and their distinct way of life

have contributed to discrimination in a variety of settings. Travellers' living circumstances and social situation in many instances continues to be one of extreme deprivation and include low levels of participation in education, training, employment, and housing and accommodation. Travellers also have a general health status which is much lower than that of the settled population, including a life expectancy far below the national average. A 1986 ESRI Report stated that Travellers " ... are a uniquely disadvantaged group: impoverished, under-educated, often despised, they live on the margins of Irish society ...".¹⁴⁶ In many ways, this is still true today.

5.3 Characteristic: Travellers

To take account of the issues outlined above, the following characteristic is proposed.

"Travellers have a nomadic tradition and a means of communication, beliefs, values and practices distinct from the majority culture."

5.4 Applying question

To apply the question on inequalities likely to lead to poverty for Travellers, the following steps should be taken.

1. Assess the policy or programme being proofed against the characteristic above by asking:
 - Does the policy or programme have a particular relevance to Travellers?
 - Does the characteristic suggest the need for a specific focus on Travellers in the design and delivery of this policy or programme?

2. If the answers to step one are yes:
 - Identify from the text in 5.5 and 5.6 below what knowledge is required and where this knowledge can be sourced to ensure that the design and delivery of this policy or programme take account of the specific identity, situation and experience of Travellers.
3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on Travellers. Then explore adjustments that could be made to maximize the benefits or outcomes for Travellers from the policy or programme.

5.5 How is this characteristic linked to inequality?

Travellers have a long history of discrimination, particularly related to the denial or the misrepresentation of their culture and nomadic way of life. This has resulted in poorer levels of participation and outcomes for Travellers in education, training, employment, housing and accommodation, and health compared to the settled population.

Education and training

- The formal education system in Ireland has developed with settled people in mind and as such, does not adequately meet the needs of Travellers who are mobile.¹⁴⁷
- The distinct identity of the Traveller community and its place in Irish society is often neglected in the school curriculum and ethos.¹⁴⁸ For many Travellers, therefore, formal education is seen to work against, rather than with, their distinct values and culture. Travellers experience

difficulties in education and training institutes arising from a lack of appropriate intercultural curricula.¹⁴⁹

- Prejudice and discrimination towards Travellers in Ireland is such that some schools still refuse to accept Travellers, stating that the school is either full or unsuitable to meet their needs.¹⁵⁰

Employment

- The traditional economic activities of Travellers (including trading, recycling, scrap metal collecting and horse dealing) have declined in recent years and this has given rise to difficulties in pursuing new economic activities.¹⁵¹ To some degree, this is explained by a failure on the part of many in the settled population to appreciate and encourage the self-employed occupations of Travellers.

Housing and accommodation

- Housing and accommodation for Travellers continues to remain dramatically poorer compared to the settled population.¹⁵²
- There is continued opposition by settled residents to Travellers living in close proximity to their homes and to accepting Travellers as their neighbours.¹⁵³
- There is a lack of suitable accommodation for Travellers in Ireland and many are forced to live on either unofficial or temporary halting sites without proper access to water, electricity and sanitation.¹⁵⁴

Health

- Failure to accommodate Travellers' nomadic way of life has given rise to poor living conditions for many. This has in turn placed them at a high risk of ill health.¹⁵⁵ Research has

highlighted considerable differences between Travellers' health and settled people's health.¹⁵⁶ The life expectancy of Travellers is considerably below the national average and infant mortality rates among the Traveller community are over twice those of the settled community.¹⁵⁷

- Discrimination experienced by Travellers in a variety of settings (including schools, jobs, hospitals and shops) is a source of much mental stress and therefore has negative consequences for Travellers' health.¹⁵⁸

Social participation

- Direct and indirect discrimination experienced by Travellers at all levels contributes to high levels of isolation from mainstream life, undermines their capacity to participate effectively in social and economic activities and maintains their position on the margins of Irish society.¹⁵⁹

5.6 How are these inequalities likely to lead to poverty?

Research has shown that the Traveller community has relatively low standards of living and is at a high risk of poverty.¹⁶⁰ The revised NAPS, *Building an Inclusive Society*, (2002) has identified Travellers as a priority group and includes an overall objective to improve their situation by providing appropriate education, health and housing and by removing barriers to their full participation in economic and social life.¹⁶¹ The inequality-poverty link for Travellers is evident in the following areas.

Education and training

- Failure to recognise Traveller culture in the education system means that many Traveller children can feel isolated. This has given rise to low participation among Traveller children in education. Figures show, for example, that 80 per cent of Traveller children between the ages of 12 and 15 do not attend school.¹⁶² Poor participation in education is one of the factors explaining the low levels of Traveller participation in the labour market and the high dependence on social welfare.¹⁶³
- Low participation in education has given rise to high levels of illiteracy among Travellers.¹⁶⁴ This has the effect of restricting Travellers' involvement in adult education, training and employment and confining them to unemployment or low paid work.

Employment

- The difficulties experienced by Travellers in education directly affect their employment prospects and maintain their low levels of participation in the labour force.¹⁶⁵
- The lack of support for Travellers' preferences for self-employment and work in the traditional Traveller economy has contributed to high unemployment and reliance on social welfare payments among the Traveller community.¹⁶⁶

Housing and accommodation

- The risk of poverty for Travellers is increased by a lack of culturally appropriate, adequate, accessible and affordable housing and accommodation.¹⁶⁷

- Failure to meet the housing and accommodation needs of Travellers also maintains their low uptake of education, health and employment services.¹⁶⁸

Health

- The range of inequalities faced by the Traveller community (including those arising from living in a hostile environment where discrimination is frequent) directly affect Travellers' health status. Ill health in turn contributes to an increased risk of poverty amongst Travellers by limiting their capacity to participate fully in economic and social life.

Social participation

- Direct and indirect discrimination against Travellers at many levels creates barriers to full participation in society. This contributes to narrower social networks and in turn to lower prospects for improving their economic situation and general living conditions.

5.7 Black and other minority ethnic groups

There has been a growth in recent years in the numbers of Black and other minority ethnic groups in Ireland. These include a diversity of religions, languages and cultures. The immigrant population in Ireland grew by about 5 per cent between 1994 and 1999 and includes asylum seekers, refugees, economic migrants and other immigrants.¹⁶⁹ Of the 10,938 asylum seekers who entered Ireland in 2000, the majority were from Nigeria, Romania, the Czech Republic, Moldova and the Congo.¹⁷⁰ However, figures from the United Nations High Commissioner for

Refugees (UNHCR) show that only 2 per cent of asylum seekers were granted full refugee status in Ireland following their initial application in 2000 in comparison with a figure of 11 per cent for appeals cases. The overall figure for successful applications in 2000 was 5 per cent with the result that only a small number of asylum seekers were successful in being recognised as refugees.¹⁷¹

This has consequences for the many remaining asylum seekers in Ireland as government policy is currently limited to the integration of those who have been granted refugee or "leave to remain" status. Recently arrived asylum seekers are entirely dependent on the state to meet their housing and income needs. They are not permitted to work in Ireland, to attend full time education or to travel.¹⁷² They are also treated differently in terms of access to social welfare benefits by receiving such payments through the direct provision of full board accommodation and modest weekly cash allowances. There is no compulsory accommodation for asylum seekers in Ireland and many are required to live in temporary emergency accommodation, such as hostels, guesthouses and bed and breakfasts.¹⁷³

The circumstances of asylum seekers in Ireland raise particular issues in terms of meeting basic needs. This reality is often compounded by racism, including harassment and intimidation.

Migrant workers and refugees, particularly the unskilled, are also vulnerable to racism. In the absence of exact data, the extent of the racism confronted by Black and other minority ethnic groups in Ireland is difficult to quantify. Nevertheless, it takes many forms, ranging from verbal and physical attacks to the denial of opportunities, resources and services. This situation is

often worsened by the fact that many Black and other minority ethnic groups have little or no knowledge of the English language.

The situation of migrant workers in Ireland is largely undocumented. Media reports have highlighted poor employment and accommodation conditions. Casework and research by the Equality Authority have highlighted significant discrimination experienced by migrant workers.¹⁷⁴

5.8 Characteristic: Black and other minority ethnic groups

To take account of the issues outlined above, the following characteristic is proposed.

“Black and other minority ethnic groups have their own means of communication, beliefs, values and practices distinct from the majority culture.”

5.9 Applying the question

To apply the question on inequalities likely to lead to poverty for Black and other minority ethnic groups, the following steps should be taken.

1. Assess the policy or programme being proofed against the characteristic above by asking:

- Does the policy or programme have a particular relevance to Black and other minority ethnic groups?
- Does the characteristic suggest the need for a specific focus on Black and other minority ethnic groups in the design and delivery of this policy and programme?

2. If the answers to step one are yes:

- Identify from the text provided on the group in 5.10 and 5.11 below what knowledge is required and where this knowledge can be sourced to ensure that the design and delivery of this policy or programme take account of the specific identity, situation and experience of Black and other minority ethnic groups.

3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on Black and other minority ethnic groups. Then explore the adjustments that can be made to maximise the benefits or outcomes for Black and other minority ethnic groups of the policy or programme.

5.10 How is this characteristic linked to inequality?

Black and other minority ethnic groups are not homogeneous and issues such as religion, language, culture, legal status or national origin can compound and reinforce the inequalities they experience. Some of the inequalities are evidenced in the following areas.

Education

- Although attendance at school is compulsory for all children between 6 and 16 years of age, there remain a number of barriers to effective participation in education for Black and other minority ethnic groups. These include problems arising from interruptions in their education, trauma (including separation from, and not being cared for, by parents), living in temporary accommodation and poor knowledge of the English language.¹⁷⁵ There are also other

problems associated with the Irish education system itself, including a lack of intercultural curricula, a lack of proper resources for effective induction and racism experienced by children in school.

- The academic or professional qualifications of Black and other minority ethnic groups are not always recognised.¹⁷⁶ This is particularly true for asylum seekers who, despite their level of qualifications, are not permitted to seek or obtain employment in this country.

Training and employment

- For Black and other minority ethnic groups there are clear differences between having the right to work and being able to find a job.¹⁷⁷ Many face difficulties in accessing training and employment due to administrative obstacles, discrimination, problems related to education and vocational training, and language and cultural barriers.¹⁷⁸
- Migrant workers have reported low pay and poor working conditions.

Housing and accommodation

- Some Black and other minority ethnic groups experience difficulties in accessing secure housing and a disproportionate number live in the private rented sector with poor security of tenure.¹⁷⁹ This has negative consequences for the resettlement and integration of Black and other minority ethnic groups into Irish society.
- Some Black and other minority ethnic groups find it difficult to secure private rented accommodation due to the high costs, reluctance on behalf of some landlords to accept rent allowance, language barriers, and/or discrimination.¹⁸⁰

Health

- Refugees and asylum seekers are issued with medical cards which provide them with the same level of access to GP services and hospital and dental care as Irish citizens on social welfare or low incomes. They do not, therefore, experience inequalities in eligibility for health services. However, they face additional barriers in terms of culture, language and dealing with a health system that can take little account of the particular circumstances which brought them to Ireland.¹⁸¹
- There is also some evidence to suggest that some general practitioners are unwilling to take refugees and asylum seekers as patients because the language barrier proves to be very time consuming.¹⁸²

Social participation

- There is increasing evidence of racism, involving harassment and intimidation, against Black and other minority ethnic groups in Ireland. Many confront racism in their home environment, usually from people who feel threatened by the changing ethnic profile of their areas.¹⁸³

5.11 How are these inequalities likely to lead to poverty?

Arising from their lack of entitlement to basic rights and services, migrants and members of minority ethnic groups have been identified as a priority theme in the revised NAPS *Building an Inclusive Society*, (2002). This includes the overall objective of ensuring they are not at a greater risk of poverty than the majority of the population.¹⁸⁴ The achievement of this objective requires that the links between inequality and poverty for Black and other minority ethnic groups be

identified and addressed in policy and provision. These include the following.

Education

- Inequalities in the education system reduce the employment opportunities available to Black and other minority ethnic groups and therefore increase their risk of poverty. It has been shown, for example, that failure to address the cultural and language barriers confronted by refugee and asylum seeker children in schools has not only reduced the quality of their education, but has also compromised their future training and employment opportunities.¹⁸⁵ Similarly, failure to recognise the academic or professional qualifications of many refugees has had a significant impact on both their employment and earning prospects.¹⁸⁶

Employment

- The inequalities experienced by Black and other minority ethnic groups in accessing employment and in turn the workplace, confine many to poverty by limiting their economic independence and impeding their effective integration into Irish society.¹⁸⁷

Housing and accommodation

- There is a poverty trap for some people on taking up work arising from the loss of rent subsidy. It has a particularly strong affect on refugees who are disproportionately concentrated in private rented accommodation.¹⁸⁸

Health

- Failure to meet the health needs of Black and other minority ethnic groups, and other in particular refugees and asylum seekers, has numerous adverse affects, including reducing their ability to participate in the labour market and maintain an adequate standard of living.

Social participation

- Racism and discrimination experienced by Black and other minority ethnic groups leads to isolation and lower overall levels of access to, and participation in, economic and social opportunities.¹⁸⁹

► SEXUAL ORIENTATION

6.1 Introduction

There is no definite data in relation to the size and composition of the lesbian, gay and bisexual communities in Ireland. The international research literature includes many different estimates ranging up to 10 per cent of the population. It is likely that in Ireland, as elsewhere, a significant proportion of this group continue to hide their sexual identity.¹⁹⁰

The position of lesbians and gay men in Irish society has changed significantly over the last decade. This is partly due to the introduction of important anti-discrimination provisions, including the decriminalisation of homosexuality in Ireland in 1993,¹⁹¹ the Employment Equality Act (1998) and the Equal Status Act (2000). However, despite recent progress in improving rights and social justice for lesbians and gay men, exclusions still exist and many continue to face discrimination in several areas of their lives. As stated in an EU funded report on homosexuality, " ... in Europe, as elsewhere, lesbians and gay men are subjected in all spheres of social relations, often from an early age, to ridicule, intimidation, discrimination and outright physical assault. They are subjected to this not because of what they do but because of who they are".¹⁹²

Prejudice and discrimination on the grounds of sexual orientation are largely due to heterosexism, i.e. the belief that heterosexuality is the norm.¹⁹³ In some quarters of Irish society there is strong opposition to recognising the rights and entitlements of lesbians and gay men. Many lesbians and gay men therefore feel that they cannot be open about their sexual orientation in all or some of their family, social and work environments and

choose to live hidden and isolated lives. This prevents their full participation in society and compromises their fundamental social, economic and legal rights.

6.2 Characteristic – lesbians and gay men

To take account of the issues outlined above, the following characteristic is proposed.

"Lesbians and gay men are attracted to and may form relationships with people of the same gender. While lesbians and gay men may comprise up to 10 per cent of any given population, many choose to hide their identity."

6.3 Applying the question

To apply the question on inequalities likely to lead to poverty for lesbians and gay men, the following steps should be taken.

1. Assess the policy or programme being proofed against the characteristic above by asking:
 - Does the policy or programme have a particular relevance to lesbians and gay men?
 - Does the characteristic suggest the need for a specific focus on lesbians and gay men in the design and delivery of this policy or programme?
2. If the answers to step one are yes:
 - Identify from the text in 6.4 and 6.5 below what knowledge is required and where this knowledge can be sourced to ensure that the design and

delivery of this policy or programme takes account of the specific identity, situation and experience of lesbians and gay men.

3. On the basis of the data and information gathered, assess the likely impact of this policy or programme on lesbians and gay men. Then explore adjustments that could be made to maximize the benefits or outcomes for lesbians and gay men from the policy or programme.

6.4 How is this characteristic linked to inequality?

Cultural disapproval of homosexuality has led to inequalities arising from actual or fear of prejudice, discrimination and hostility in areas such as employment, education, housing and accommodation, health and personal safety. Research has shown that lesbians and gay men who are open about their sexuality suffer particular disadvantages in these settings in comparison with heterosexuals.

Employment

- Work opportunities can be severely limited for lesbians and gay men, some of whom avoid work for which they are qualified because they fear discrimination.¹⁹⁴ In some instances, homosexuality is hidden when applying for a job for fear that the application may be turned down or will not be fairly considered by prospective employers.¹⁹⁵
- Employment sources can make inappropriate referrals or may bring inappropriate value judgements to bear about applicant suitability for lesbian, gay and bisexual clients without the necessary sensitivity and awareness training.¹⁹⁶

- In addition to job opportunities being limited for lesbians and gay men, some find it difficult to reconcile their jobs with their sexuality.¹⁹⁷ This can have a number of consequences, including reinforcing their decision to hide their identity, prompting them to resign from jobs, discouraging them from applying for jobs for which they are qualified, and confining them to unemployment.
- Lesbians and gay men in relationships are often excluded from benefits provided by many employers to married employees or, in some instances, to employees who are in heterosexual relationships.¹⁹⁸ These may include health and life insurance policies, certain types of pensions and special leave to care for family members. Thus, disclosing involvement in a same sex relationship often brings little value-added in terms of resources and runs the additional risk of prejudice and discrimination in the workplace.

Education

- Assumptions of heterosexuality are strong in the Irish education system and only little attention has been given to developing strategies to assist lesbians and gay men to cope with their environment.¹⁹⁹ The school setting can therefore often serve to isolate and marginalise young lesbians and gay men who are generally fearful of being rejected by friends and teachers upon disclosing their sexual orientation.²⁰⁰
- Homophobic bullying and harassment can all too often be part of the school experience for lesbian, gay and bisexual pupils.²⁰¹ The lack of positive images of lesbian, gay and bisexual people in the school curriculum contributes to isolation and lack of

self-esteem.²⁰² The consequences of this are manifold and include early school leaving and lower levels of educational attainment among some lesbians and gay men.

Housing and accommodation

- It has been shown that many lesbians and gay men suffer greater disadvantages in accessing housing and accommodation than heterosexuals. As a consequence of this, some lesbians and gay men feel it is safer to hide their sexual orientation to obtain rented accommodation.²⁰³ For some gay men, hiding their sexual orientation is an approach to avoid problems in securing a mortgage protection policy and/or a life assurance policy due to a perceived risk of HIV.²⁰⁴
- The difficulties faced by single people and unmarried couples in housing provision can render it difficult for some lesbians and gay men to access public housing, even when there is a recognised need for such housing.²⁰⁵
- The absence of partnership rights for same sex couples creates a range of difficulties for lesbians and gay men in terms of inheritance, property rights and shared tenancy issues.²⁰⁶

Health

- Some lesbians and gay men experience increased levels of psychological distress arising from failure to disclose their sexual orientation.²⁰⁷ It is notable, however, that homophobic discrimination can also compromise the psychological health and well being of those who are open about their homosexuality.
- The attitudes and judgements of some health care professionals towards lesbian, gay and bisexual people have been identified as reducing the

benefits of a range of health services.²⁰⁸

Personal safety

- There is an increased risk of physical or verbal violence for lesbians and gay men. Some have been beaten, punched, hit or kicked because they were gay.²⁰⁹ Research has also highlighted that some lesbians and gay men are bullied and harassed by people known to them, including in school and at work.²¹⁰ This operates to discourage lesbians and gay men from disclosing their sexual orientation to different people in their immediate environments, thereby compromising their ability to live free and comfortable lives.

Partnership rights

- Lesbian and gay couples experience particular vulnerability because there is no legal recognition of their relationships. This is particularly evident during times of death or serious illness of a partner and in relation to issues of child rearing and child custody.²¹¹

6.5 How are these inequalities likely to lead to poverty?

The NAPS recognises that “while homosexuality in itself does not necessarily place one at risk of poverty, the impact, experience and perception of discrimination may limit the full participation of gay men and lesbians in society, and may in some cases place them at risk of poverty”.²¹² As shown above, revealing one’s homosexuality can lead to discrimination in areas critical to social and economic well being and this can subsequently increase the risk of poverty for lesbians and gay men.

Employment

- The loss of employment and promotion opportunities arising from discrimination in the workplace can result in substantial financial losses for lesbians and gay men.²¹³ However, being refused a job often presents a bigger obstacle than actually losing a job or being dismissed.²¹⁴
- It has been shown that discrimination in the workplace has resulted in some lesbians and gay men leaving or being dismissed. A research study on the experiences of lesbians and gay men in Ireland explored this issue in further detail and found that many of those dismissed from their jobs were living in poverty.²¹⁵

Education

- Inequalities in the Irish education system can limit the capacity of lesbians and gay men to participate on an equal footing with other students.²¹⁶ This contributes to lower levels of educational attainment among some which in turn reduces their capacity to access good quality and sustainable employment.

Housing and accommodation

- The difficulties faced by single people and unmarried couples in public housing provision can place some lesbians and gay men at an increased risk of poverty by forcing them to rely on private rented accommodation.
- Research has shown that there is a high risk of homelessness among young lesbians and gay men in Ireland. This can result from a number of factors, including being disowned by family and friends upon “coming out” or having to leave the family home due to fear of rejection.²¹⁷

Health

- The psychological distress resulting from actual or fear of prejudice and discrimination can contribute to an increased risk of poverty among some lesbians and gay men by, for example, compromising their ability to both access and sustain employment. It has also been shown that lesbians and gay men who are at risk of or affected by poverty have higher signs of psychological distress. This is particularly true for lesbians and gay men experiencing homophobic discrimination and/or attempting to hide their sexual orientation.²¹⁸
- Negative and stereotypical attitudes and judgements can serve as a barrier to an adequate health status for lesbian, gay and bisexual people.²¹⁹

Personal safety

- Homophobic violence and harassment impacts significantly on the economic and social well being of lesbians and gay men by compromising their ability to participate fully in a variety of settings, including education, training, employment and recreation.²²⁰

Partnership rights

- The absence of partnership rights for same sex couples creates disadvantage for lesbian, gay and bisexual people that can have serious financial implications. This happens in areas such as taxation, pensions, succession rights and property rights in the event of separation.²²¹

Conclusion

This Report seeks to contribute to our understanding of the links between poverty and inequality. In particular, it seeks to assist us in the development of the equality/poverty proofing process. The Report builds on existing work and seeks to contribute to the development of a more integrated proofing process.

The multi-dimensional nature of poverty and inequality is highlighted in the Report, and a knowledge base is developed in an effort to increase our understanding of how these different dimensions can be taken into account in mainstream policy design and review.

As the work is developed, a transitional learning and capacity building period will be required so that the mechanics of equality/poverty proofing can be mastered. In the longer term poverty and inequality issues should be addressed in mainstream policy as a matter of course. This is necessary if we are to work towards a more equal and poverty-free society.

▶ **IMPLICATIONS OF THE REPORT**

There are a number of implications from the work of this Report.

First, there is a need to acknowledge and understand the interconnections between poverty and inequality and the need to address the broader issues pertaining to inequality if poverty in Ireland is to be eliminated, as set out in the revised NAPS (National Anti-Poverty Strategy, *Building an Inclusive Society*, 2002). This Report sets out some of these linkages.

Secondly, there needs to be mechanisms by which these inequalities which lead to poverty can be addressed. Development of the poverty proofing process to enhance the focus on inequalities likely to lead to poverty is one way of doing this. This Report provides a template to support this by identifying characteristics and trigger questions.

Thirdly, data and information are required to assist in applying poverty proofing. Various initiatives are underway to develop poverty and inequality data sources including the proposed data strategy to be developed as part of the revised NAPS.

Fourthly, training will be required to ensure that this Report and other relevant material is provided to, and effectively applied, by those who will undertake poverty proofing. Resource materials need to be developed to assist in the application of equality/poverty proofing.

Fifthly, it is clear from this Report that it is necessary to work with, and ensure the participation of, the population groups affected by inequalities leading to poverty. Since these groups have first hand experience, they and their organisations are best placed to know which policies or programmes are most relevant to their identity, situation and experience.

► KEY CHALLENGES

The Combat Poverty Agency and the Equality Authority recognise the following challenges in taking this work forward.

- This Report should be widely distributed to all public servants likely to be involved in poverty proofing.
- Pilot projects should be established in a small number of government departments to test the application of the approach suggested in this Report.
- The supports required to apply the question in the poverty proofing Guidelines on inequalities leading to poverty should be developed and made available. These should include the preparation of training material from this Report and other work on poverty proofing and the inclusion of poverty proofing in training modules for public servants. All relevant data should be gathered and made available to public servants, in written form or through the internet. Additional supports and advice are available from the Combat Poverty Agency and the Equality Authority, as required.
- The various data initiatives which are being developed, (including the NAPS Data Strategy, initiatives on equality statistics and the development of data to monitor the implementation of the National Development Plan), need to ensure that data can be disaggregated by the range of equality grounds in the equality legislation and by income and socio-economic status. Progress is being made on this front through the development of a framework for social and equality statistics in Ireland, being led by the National Statistics Board.²²²
- The participation of those groups affected by inequality and poverty and their organisations should be secured to ensure that policies are having an effective impact on addressing inequalities and poverty.
- Local authorities and other organisations making policies and delivering services at a regional and local level should apply poverty proofing, taking into account inequalities which lead to poverty.²²²
- This Report should be the start of work to develop a more integrated proofing process which brings together the related proofing agendas of gender, poverty and equality.

Appendix 1

Guidelines for the implementation of poverty proofing procedures²²⁴

1. INTRODUCTION

- 1.1 Following the government decision of 23 July 1998, in line with a Partnership 2000 commitment to strengthen administrative procedures for equality proofing in the context of the NAPS, (National Anti-Poverty Strategy), it is now a *requirement* in the update *Cabinet Handbook*, published in October 1998 (p.19), that memoranda for the government involving significant policy proposals “*indicate clearly the impact of the proposal on groups in poverty or at risk of falling into poverty in the case of significant policy proposals.*”
- 1.2 Although some departments’ remit may not seem to impact directly on poverty, and while some are not involved in direct service delivery, it must be noted that this is an *obligatory requirement*. While secondary effects of some proposals (particularly those which are not directly aimed at alleviating disadvantage) may not be immediately apparent, *they may still have an impact on the poor*, or may, inadvertently, lead to a risk of poverty for some people/groups.
- 1.3 The statement of impact on poverty should be based on a *systematic analysis*, using the framework previously circulated and outlined again in section 4 below. Appendix A contains worked examples of the poverty proofing process applied to sample policy proposals, as submitted by their respective lead departments.

2. WHAT IS POVERTY?

- 2.1 Poverty is defined in the NAPS (adopted by government in April 1997) as follows:

“People are living in poverty if their income and resources (material, cultural and social) are so inadequate as to preclude them from having a standard of living which is regarded as acceptable by Irish society generally. As a result of inadequate income and resources, people may be excluded and marginalised from participating in activities which are considered the norm for other people in society.”

- 2.2 The NAPS overall target focused on the 9-15 per cent of Irish households that were determined, in the ESRI’s *Living in Ireland Survey*, currently being updated to 1997, to be “consistently poor” (based on the 50 per cent and 60 per cent relative income poverty lines *combined with* the presence of basic deprivation). The target is to reduce this proportion to less than 5-10 per cent of households by 2007.²²⁵

There are also subsidiary targets in relation to the five key themes identified in the NAPS: Educational Disadvantage, Unemployment, Income Adequacy, Disadvantage Urban Areas, and Rural Poverty.²²⁶

3. WHAT IS POVERTY PROOFING?

3.1 Poverty proofing is defined as follows:

“Poverty proofing is the process by which government departments, local authorities and state agencies assess policies and programmes at design and review stages in relation to the likely impact that they will have, or have had, on poverty and on inequalities which are likely to lead to poverty, with a view to poverty reduction.”

3.2 The primary aim of the process is to identify the impact of the policy proposal on the poor so that this can be given proper consideration in designing the policy. It is not intended that poverty proofing requires that all policies be fundamentally transformed so that they are *explicitly* targeted at the disadvantaged. (Attention is drawn to the point made at 3.3. below.)

3.3 The potential effects of some policy proposals may be ambiguous in the sense that the policy may have a positive effect on some poverty risk groups and a negative (or no) effect on others. In such cases, *all* potential effects should be highlighted. One should consider the varying effects (if applicable) to each of the poverty risk groups as outlined below (4.4) and how any adverse effects on these groups might be counteracted. The possibility of particular groups being inadvertently excluded from the potential benefits of a proposal should also be noted.

4. POVERTY PROOFING PROCEDURES

4.1 The procedure outlined below is as previously circulated in the document, *Policy Proofing in the Context of the National Anti-Poverty Strategy*.

4.2 Proofing what?

Poverty proofing should be undertaken in the following circumstances:

- in the preparation of SMI Statements of strategy and annual business plans;
- in designing policies and preparing memoranda to government on significant policy proposals;
- in the preparation of the estimates and annual budget proposals. This will also include expenditure reviews and programme evaluations;
- in the preparation of the National Development Plan and other relevant EU plans and programmes; and
- in the preparation of legislation.

4.3 Proofing how?

In the circumstances outlined above, departments should individually address the following questions.

- What is the primary objective of this policy / programme / expenditure proposal?
- Does it:
 - i. help to prevent people falling into poverty?
 - ii. reduce the level (in terms of numbers and depth) of poverty?
 - iii. ameliorate the effects of poverty?
 - iv. have no effect on poverty?
 - v. increase poverty?
 - vi. contribute to the achievement of the NAPS targets (including subsidiary targets under the five themes)?

- vii. address inequalities which might lead to poverty? (see 4.5 below)
- viii. as proposed, reach the target group(s)? (see 4.4 below)

What is the rationale and basis of the assessment (for example, administrative data sources/household survey data, Working Group or Task Force Report etc.) behind each of these replies?

- If the proposal has the effect of increasing the level of poverty, which options might be identified to ameliorate this effect? (This could include proposals to counteract adverse effects which may be identified for certain sub-groups even where the impact on the overall population is positive – see 3.3 above.)
- If the proposal has no effect on the level of poverty, which options might be identified to produce a positive effect? (Again this could address any potential for certain social categories to miss out on benefits generally available to the target group.)

4.4 In answering these questions, particular attention should be paid to those groups which have been identified as being either in persistent poverty or known to be at risk of poverty (in both rural and urban areas), viz.:

- the unemployed, particularly the long term unemployed;
- children, particularly those living in large families;
- single adult households and households headed by someone working in the home;
- lone parents;
- people with disabilities;
- older people, in particular households headed by a retired person;
- members of the Traveller community;
- people who are homeless;
- black and other ethnic minority groups.

4.5 Particular attention should also be paid to *inequalities which may lead to poverty*. These could arise, for instance, in the context of age, gender, disability, belonging to an ethnic minority group (including membership of the Traveller community) or sexual orientation.

Appendix 2

Key organisations and personnel consulted

Age and Opportunity

Catherine Rose, Anne Leahy and Sylvia Meehan

Department of Education and Science

Patricia O'Connor

Department of Justice, Equality and Law Reform

Niall McCutcheon

Department of Social and Family Affairs

Deirdre O'Carroll, Ann Vaughan and Mary Kennedy

Gay HIV Strategies

Kieran Rose and Brian Sheehan

Kerry Network of People with Disabilities

Jacqui Brown

National Consultative Committee on Racism and Interculturalism (NCCRI)

Philip Watt

National Youth Council of Ireland

Dónal Geoghegan

National Women's Council of Ireland (NWC)

Orla O'Connor and members of focus group

One Parent Exchange Network (OPEN)

Frances Byrne

Pavee Point

Martin Collins, Ronnie Fay and Brid O'Brien

Schizophrenia Ireland

Orla O'Neill

Women's Education Research and Resource Centre (WERRC), UCD

Ursula Barry

Maureen Basset and Ray Smyth (working with men's groups)

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- 200 ILGA-Europe (1998), *op. cit.*, p.16
- 201 Equality Authority (2002c), *op. cit.* p.42
- 202 *ibid.* p.42
- 203 *ibid.* p.21
- 204 This risk of HIV is not considered to be as high for women. Lesbians therefore generally do not experience the same difficulties in obtaining mortgage protection and/or life assurance policies. See Mee, J. and Royane, K. (2000), *Partnership Rights of Same-Sex Couples*, Dublin: Equality Authority, p.25
- 204 *ibid.* p.64
- 205 Equality Authority (2002c), *op. cit.*, p.69
- 206 GLEN/Nexus (1995), *op. cit.*, p.73
- 207 Equality Authority (2002c), *op. cit.*, p.32
- 209 *ibid.* pp.77-79
- 210 ILGA-Europe (1998) *op. cit.*, p.16
- 211 Equality Authority (2002c), *op. cit.*, p.20
- 212 Government of Ireland (1997), *op. cit.*, p.72
- 213 ILGA-Europe (1998), *op. cit.*, p.20
- 214 Snape, D., Thompson, K., and Chetwood, M. (1995) *Discrimination Against Gay Men and Lesbians: a Study of the Nature and Extent of Discrimination against Homosexual Men and Women in Britain Today*, London: Social and Community Planning Research, p.17
- 215 GLEN/Nexus (1995), *op. cit.*, p.57
- 216 *ibid.* pp.46-47
- 217 ILGA-Europe (1998), *op. cit.*, p.16
- 218 *ibid.* p.75
- 219 Equality Authority (2002c), *op. cit.*, p.37
- 220 GLEN/Nexus (1995), *op. cit.*, p.15
- 221 Equality Authority (2002c), *op. cit.*, pp.22-26
- 222 The Combat Poverty Agency has recently published a report on poverty data sources *Guide to Sources of Data on Poverty*. The Equality Authority has also published a report on equality data issues entitled *Building the Picture*.
- 223 Also relevant here is the Equality Proofing Template published by the Equality Authority to support the City and County Development Boards to equality proof their plans.
- 224 Further information and a copy of the Guidelines can be found at <http://portal.welfare.ie/publications/>

allpubs/naps/poverty_proofing_guidelines.xml

- 225 The revised NAPS, introduced in 2002, notes that consistent poverty has fallen from 15.1 per cent in 1994 to 6.2 per cent in 2000. The key target in this Strategy is to “reduce the numbers of those who are ‘consistently poor’ below 2 per cent and, if possible, eliminate consistent poverty, under the current definition of consistent poverty. Specific attention will be paid to particular vulnerable groups in the pursuit of this objective”. See Government of Ireland (2002), *Building an Inclusive Society. Review of the National Anti-Poverty Strategy under the Programme for Prosperity and Fairness*, Dublin: Department of Social, Community and Family Affairs, pp. 8-9
- 226 The revised NAPS, *Building an inclusive Society*, (2002), includes updated targets for the original five themes and new targets on additional themes of: housing/accommodation, and health. The revised NAPS also includes new and associated targets and actions on: children and young people, women, older people, Travellers, people with disabilities, and migrants and members of ethnic minority groups. See Government of Ireland (2002), *op. cit.*, pp.12-18

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