



Linking Research & Innovation for Gender Equality

D6.5 Policy Briefings v1

WP6 - Dissemination and
Communication

Version: 1

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Document information

Grant Agreement Number	873134	Acronym	CALIPER	
Full Title	The CALIPER project: Linking research and innovation for gender equality			
Topic	SwafS-09-2018-2019-2020 - Supporting research organisations to implement gender equality plans			
Funding scheme	CSA – Coordination and Support Action			
Start Date	1 st January 2020	Duration	48 months	
Project URL	http://caliper-project.eu/			
EU Project Officer	Raquel FERNANDEZ HORCAJADA			
Project Coordinator	Vasiliki Moumtzi – ViLabs Kyriaki Karydou – ViLabs			
Deliverable	D6.5 Policy briefings v1			
Work Package	WP6 – Communication and Dissemination			
Date of Delivery	Contractual	M26	Actual	M26
Nature	R - Report	Dissemination Level	P - Public	
Lead Beneficiary	ViLabs			
Responsible Author (s)	Kyriaki Karydou (ViLabs), Danai Kyrkou (ViLabs)			
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Reviewer(s):	ULB, SV			
Keywords	Inclusive Gender Equality Plans, GEP, Research, Policy recommendations			



Document History

Version	Issue Date	Stage	Changes	Contributor
0.10	19/08/2021	Draft	ToC	ViLabs
0.20	23/08/2021	Draft	Guidelines drafted on developing the policy briefings	ViLabs
0.30	31/01/2022	Draft	Draft version sent to partners for comments	All partners
0.40	22/02/2022	Draft	1st draft version sent for internal review	SV, ULB
0.50	28/02/2022	Draft	Comments from reviewers incorporated	ViLabs
0.60	28/02/2022	Pre-final	Pre-final version sent to reviewers	SV, ULB
1.00	28/02/2022	Final	Deliverable submitted	ViLabs



Executive Summary

The D6.5 “Policy Briefings v1” which is part of Task 6.4: Development of Policy briefings and final conference, provides detailed information and concrete steps on how to design and develop an inclusive Gender Equality Plan (GEP). This deliverable includes European and nine national policy briefings developed by ViLabs and the CALIPER’s RPOs/RFOs respectively. It targets European and national policymakers working in Research and Innovation (R&I) sector and Higher Education, providing them with the knowledge and experience gained throughout the CALIPER’s implementation phase and more specifically with concrete steps on the design and development of inclusive GEPs.



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1 Introduction

1.1 Purpose & Scope

This deliverable aims at producing key policy briefings to reflect the ongoing preliminary findings and the experiences and advancements gained during the CALIPER's lifetime in relation to the design and development of inclusive GEPs in seven RPOs and two RFOs in STEM fields.

Within CALIPER's time span, and in three different "versions", nine policy briefings at national level (one per RPO/RFO) and one at European level will be developed. In particular, in each of the three versions, each of the CALIPER'S participating RPOs/RFOs will be developing one national policy briefing with the aim of linking Research and Innovation towards gender equality. ViLabs, CALIPER's coordinator, will develop the relevant policy briefing at the European level in each of these three versions.

The present deliverable D6.5 *Policy briefing v1* is the first version in this "series" of policy briefings that CALIPER project will develop. Each of the three policy briefing versions will be following a specific topic according to the progress of the project and the stages for a GEP development. The list below described the focus areas of each of the policy briefing "version":

- *1st version: Policy briefing v1*: Focusing on the design and development of a GEP
- *2nd version: Policy briefing v2*: Focusing on the implementation of a GEP
- *3rd version: Policy briefing v3*: Focusing on the Evaluation and assessment of a GEP

In particular, the present deliverable D6.5 *Policy briefing v1*, which is the first out of three to be developed, aims at guiding European and national (in Croatian, Greek, Georgian, Italian, Belgian, Spanish, Romanian, Turkish) practitioners and policymakers on developing inclusive GEPs tailored to the European and domestic needs. Additionally, they go beyond the GEPs minimum requirements as defined in Horizon Europe eligibility criteria, and support with concrete and practical examples the design and development of inclusive GEPs in line with the new ERA objectives on gender equality.

1.2 Structure of the deliverable

The structure of the deliverable is the following: Chapter 1 introduces the purpose and scope of the present deliverable along with its linkages with other WPs and Tasks. Chapter 2 describes the methodology that was followed in order to develop the national and European policy briefings ensuring coherence among the project partners. Chapter 3 presents the policy briefings developed at European and national level by ViLabs and each RPO/RFO respectively. A total of 10 briefings are included in this deliverable. Chapter 4 includes few final remarks of the deliverable and provides with some more information about the upcoming policy briefings "waves".

1.3 Relation to other WPs & Tasks

This deliverable is part of Task 6.4: Development of Policy briefings and final conference of WP6 Dissemination and Communication, aiming at producing key policy briefings to reflect the preliminary findings and experiences gained during the project's lifetime. This task contributes to Task 5.2 Engaging with the innovation ecosystems: CALIPER win events, T5.3 Raising awareness and engagement activities and T5.4 Sustaining and replicating in STEM as these tasks aim at creating a favourable environment for accepting and sustaining the GEPs. Furthermore, it contributes to T6.3 External communication and multiplying effect.



Last but not least, this deliverable is interlinked with WP1 Analysis of external and internal conditions for GEPs development and acceptance, WP2 Design and Development of customised GEPs, WP3 implementation of GEPs, and WP4 Monitoring and Evaluation given that it draws its content from these work packages.



2 Policy briefings' approach

2.1 Policy briefings' aim

The policy briefing can serve as a basic tool to introduce recommendations based on research findings and practical evidence, to a specific audience interested in policy developments under the topics at stake. The policy briefing distills or synthesises a large amount of complex detail, so the reader can easily understand the heart of the issue, its background, the players (“stakeholders”) and any recommendations, or even predictions about the future of the issue (Eisele, 2006).

Overall, its aim is to raise awareness within the target audience about the urgency of a particular problem that needs to be tackled adopting the proposed course of measures described into the briefings servings as an impetus for action (Young, E. and Quinn, n.d.).

The first of the CALIPER policy briefings version (three in total) transfers its knowledge and supports the achievement of structural change by creating a more gender friendly environment. In particular, within this series of policy briefings, CALIPER aims at providing practical recommendations to orientate policy makers, as well as research institutions, in the development and adoption of measures, towards an inclusive GEP.

2.2 Policy briefings' target audience

All aspects of the policy briefing (from the message to the layout) need to strategically focus on the specific target audience. The policy briefing is an action-oriented tool targeting practitioners interested and/or active in a specific policy domain, in this case, related to Gender Equality in R&I. As such the briefing must provide arguments with a particular policy and propose recommendations that seem realistic to the target audience, drawing information from practical evidence.

CALIPER's policy briefings are created reflecting upon the practical evidence that the project's ongoing implementation is generating in relation to the design and development of an inclusive GEP in the seven RPOs and two RFOs.

The primary target audience of the CALIPER policy briefings is the staff and management of Higher Education Institutions, RPOs and RFO, staff, and management of governmental bodies and agencies in charge of Gender Equality as well as Higher Education, Research and Innovation at European, regional and national level. Additionally, policy makers are the primary target audience as well. The briefings will report what improvements in each country would facilitate gender equality in R&I for strengthening the environment for women researchers and valuing the gender dimension in STEM research and innovation policies. At the same time, this deliverable can be of practical use for the interested institutions, supporting the design and development of their inclusive GEP.

In addition, the document can be used as a guide and practical tool for other “Horizon2020”/“Horizon Europe” consortia aiming at achieving structural changes towards gender equality.

2.3 Policy briefings' methodology

Both the European and national policy briefings were created based on the CALIPER experience of the design and development phase of inclusive GEPs. For identifying the sections to be included in the policy briefings a thorough literature review has been made. Based on Tsai (2006) a policy briefing should follow the below structure:

Title: A brief title illustrating the content of the policy brief in a concise way



Executive summary: Including all the necessary information relevant to the target audience on what is about the policy briefing. It should aim at convincing the reader that the brief worth a more in depths investigation. The suggested length is one or two paragraphs including the description of the problem at stake, arguments in favour of changing the current policy context relevant to your topic and the suggested course of action.

Scope/context and importance of the problem: highlighting the existing problems in the current policy framework. It is worth noting that the length of the problem description may vary considerably from brief to brief depending on the stage on the policy process in focus. In this section, a clear statement of the problem or issue can be included as well as, a short overview of the root causes of the problem and a clear statement of the policy implications of the problem that clearly establishes the current importance and policy relevance of the issue.

Critique of the current policies: Including potential shortcoming identified in the local/European policy context. Here the reader needs to be persuaded about the necessity/urgency of the issue to be tackled by identifying existing gaps/problems.

Policy recommendations: presenting the arguments in a clear way in order to convince the reader about the importance to change the current policy approach. It is suggested to include in this section also specific and concrete steps or actions that need to be implemented based on research findings.

Appendices: Including tables and figures supporting the arguments, if applicable. It is suggested that appendices shall be included only when are deemed necessary.

Drawing inspiration from this methodology, in the case of the CALIPER policy briefings, a common structure was developed for the national policy briefings considering all the relevant information that needed to be included. The European briefing follows a different structure due to its slightly different content. Both structures are presented in the sections below.

2.3.1 European policy briefing

Below the sections and a respective short description included in the European policy briefing are presented.

Executive Summary

It contains a brief reference to the main argument and added value of the briefing, in order to motivate the readers to continue and trigger their interest.

The European context: Existing gender equality policies and trends

This section is highlighting the existing legal framework regarding gender equality, in the European Union. It includes a clear statement of the issues at stake, and how the CALIPER approach addresses these issues which is the need for a renewed approach on developing a Gender Equality Plan.

CALIPER recommendations for the design & development of an inclusive GEP

This is the main part of the policy briefing. It presents the CALIPER arguments and suggestions in a clear way convincing the reader about the proposed measures towards an inclusive GEP in R&I and Higher Education Institutions. This section contains specific and concrete steps and actions that can be implemented based on the CALIPER methodology and ongoing experience. The final goal of this section is to describe the methodology in order to develop an inclusive GEP taking into consideration three dimensions: Intersectionality, intersectoriality, and geographic inclusiveness. The information contained in this section is a product of 1. desk research, interviews, and experts consultations (Report [D1.3](#)), regarding the characteristics of an inclusive GEP 2. The CALIPER assessment methodology and each GEP itself ([D1.2](#) and [D2.1](#)), 3. as well as the GEPs that the RPOs/RFOs developed in the context of CALIPER. In this regard, this



section is divided into three subsections, naming the three characteristics of an inclusive GEP. The recommendations for each one include suggestions on “How” to achieve it, accompanied with preliminary evidence from the CALIPER project at its current stage of implementation.

Conclusion

This section summarises the main argument of the briefing and prepares the reader for the next version. The present policy briefing describes how the methodology adopted by the CALIPER project and its respective experience so far, contributes to the design and development of inclusive GEPs.

2.3.2 National policy briefings

As mentioned above, all national policy briefings share the same structure in the sake of consistency. Below the sections and a short description of the existing information in each of the sections included in the briefs is presented.

EU context: Existing gender equality policies and practices:

This section is used for highlighting the existing legal framework regarding gender equality, in the EU. Since it refers to the European context, it is the same for all national policy briefings. It includes a brief mapping of the trends regarding the GEPs across EU, followed by a short description of the CALIPER approach and how it applies in the EU context.

The [national] context: Existing gender equality policies and practices:

This section provides a brief mapping of the national context. The existing national legislation is described, along with potential gaps. By presenting the national context, the reader obtains an overview of the current situation regarding gender equality. The information in this section came from initial external assessment that the RPOs and RFOs of CALIPER project conducted during the design phase of their GEPs.

Evidence on [institution] gender equality policies and practices:

In this section, the focus is on the institution. It provides a description of the internal regulations they follow, in terms of gender equality. Most importantly, this section explains how and if the institution goes beyond the legal framework, by creating internal institutional policies relevant to gender equality. Also, potential gaps and shortcomings are mentioned in order to explain the need for developing an inclusive GEP.

CALIPER recommendations for the design and development of an inclusive GEP

The CALIPER recommendations are divided into two categories:

[A] Setting up the scene for the GEP design and development: In this subsection, the methodology of CALIPER is described, in order to provide the reader with information about the steps they should follow during the design and development phase on an inclusive GEP. The recommendations describe the procedures and tools that need to be developed along with information on how to develop them. Also, the institutions enriched this section with examples and information from their institutional experience. The aim is to present a methodological framework for further adaptation and replication from other interested parties at national level.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set: during the internal/external assessments and the data collection, the institutions set focus areas of action that consider crucial when implementing gender equality policies. These focus areas are similar among the RPOs/RFOs, including Human resources, institutional governance, institutional



communication, teaching and research, Student/young scientists support, research funding, sexual harassment, and intersectionality. In each focus area, specific measures are recommended, drawing upon the actions included in the GEPs that the institutions have developed in the context of CALIPER.

Conclusion

This section summarises the main argument of the briefing and prepares the reader for the next version of the policy briefing series. The session describes how the methodology adopted by the CALIPER project and its respective experience so far contributes to the design and development of an inclusive GEP. In particular, the present document elaborates on the CALIPER's knowledge and experience so far, considering the core dimensions for setting up an inclusive GEP as they have been depicted in the recent EU policies.



3 CALIPER's policy briefings

This chapter contains the 10 policy briefings that the CALIPER project has developed within the first version of policy briefings. First, the European briefing is presented, followed by the nine national briefings from the seven RPOs and two RFOs participating in the project.

3.1 European Policy Briefing

EXECUTIVE SUMMARY

The adoption of a Gender Equality Plan aims at removing the systemic obstacles to gender equality and at adapting institutional practices leaving no one behind. However, there is a need for a renewed approach on the development of a GEP. Towards this direction, the present policy briefing elaborates on the core dimensions (**intersectionality, intersectorality, and geographic inclusiveness**) mentioned in the recent European policies on gender equality referring to “inclusive GEPs” aiming at going beyond the minimum requirements for a Gender Equality Plan (GEP) as defined in Horizon Europe eligibility criteria, and support the implementation of inclusive GEPs in line with the new ERA Communication and gender equality objectives.

Elaborating on these different dimensions, this policy briefing describes how the CALIPER methodology addresses them and provides inputs on how to design and develop an inclusive GEP, according to the abovementioned dimensions.

It calls the attention of EU-level stakeholders, notably relevant services from the European Commission and the European Institute for Gender Equality, to leverage from the knowledge created by CALIPER, and support the structure of inclusive GEPs.

THE EUROPEAN CONTEXT: EXISTING GENDER EQUALITY POLICIES & TRENDS

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout Research and Innovation (R&I) systems. In particular, European Research Area (ERA) Priority 4 focuses on gender equality and gender mainstreaming in R&I¹.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for R&I and Higher Education (HE) institutions to tackle the objectives of the ERA via a set of actions implemented along with clear timelines and monitored through specific indicators².

The [Ljubljana Declaration](#) adopted in 2021, underscores the relevance of GEPs as a transformative tool “to achieve long term and sustainable advancement towards Gender equality in R&I” and the necessity for EU Member States and associate countries to develop a “common understanding of GEPs as a policy instrument” and to provide “support and resources for their development and implementation at all levels”.

The institutional change strategy implemented through GEPs has had very positive impacts in many research institutions and has been a catalyser at the national and EU level and there are expectations that the minimum requirements of the GEP as defined in Horizon Europe eligibility criteria will further stimulate change processes in Higher Education and Research Institutions. However, beyond the process related building blocks of the Horizon Europe requirement on GEPs and the recommended areas that the Plans are

¹ [European research area \(ERA\) | European Commission \(europa.eu\)](#)

² [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)



expected to cover, the European Commission is also calling for a renewed approach that promote the design and adoption of inclusive Gender Equality Plans.³

Towards this direction the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large, connecting academic research with society and the economy. This is evident from the European Commission's (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for **"inclusive" GEPs** referring to **"intersectoriality"** as one of the dimensions along with **intersectionality and geographic inclusiveness**.

The H2020 CALIPER project, which aims at addressing gender inequality in STEM in 7 RPOs and 2 RFOs across the EU, was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, the aim of the present policy brief is to elaborate on the abovementioned dimensions of inclusiveness for setting up a GEP based on the CALIPER's experience so far, contributing to this renewed approach in a practical manner.

CALIPER RECOMMENDATIONS FOR THE DESIGN & DEVELOPMENT OF AN INCLUSIVE GEP

This section elaborates further on the dimensions of **intersectionality, intersectoriality and geographic inclusiveness**, based on the CALIPER's experience for setting up an inclusive GEP.

- **Intersectionality:** It is important to re-interpret and re-define the intersectional dimension of GEPs, adopting gender and feminist interpretations towards inclusiveness.
 - ❖ **How:** Encompass qualitative and quantitative methods for performing internal analysis of the Institution placing efforts in intersectional data collection as much as possible, to gather evidence on gender and race, class, age, sexual orientation and gender identity, different abilities. This can and should be applied to external assessment of the conditions such the legal and cultural framework and the local/national innovation ecosystems that influence the state of gender equality in the wider context of which the Institution is placed.
 - ❖ **Evidence from CALIPER project:**
 - **Suggested tools for performing an intersectional gender analysis:** set up intersectional indicators to collect gender disaggregated data via desk research (CALIPER considers age/ethnicity/socioeconomic status, gender identity and sexual orientation, age, disability for collecting disaggregated data) and conduct semi-structured interviews with key external and internal institutional actors to enable the contextualisation of potential gender bias by investigating practices and organisational and innovation processes. Changing data collection methods and practices in this direction is often considered as in contrast with privacy protection and data minimization principles, particularly in smaller organizations where individuals could be easily identifiable. Specific actions to run internal consultations on how to improve data collection and analysis in this respect can and should be included in the GEPs. Collaboration with NGOs adopting an intersectional framework

³European Commission, Directorate-General for Research and Innovation, *Horizon Europe guidance on gender equality plans*, 2021, <https://data.europa.eu/doi/10.2777/876509>



can be useful to increase internal awareness and to identify measures and initiatives for intersectional inclusive GEPs.

- **Intersectoriality:** multi-stakeholders innovation ecosystems represent the demand side (of both highly skilled workforce and research products/results) for RPO/RFOs and there can be spaces to increase the number of women researchers in STEM and participate to joint efforts in taking the gender dimension of research into consideration.
 - ❖ **How: set up Research & Innovation (R&I) Hub** by adopting a quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which the organisation operates.
 - ❖ **Evidence from CALIPER project:** CALIPER has intersectoriality as key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phases, as well as in monitoring and evaluation. CALIPER's intersectorial approach which promoted structural changes through a change management methodology strongly focused on engaging with a **quadruple helix innovation ecosystem** in the regional/national context of each RPO and RFO involved in the Project. Adopting a **quadruple/multiple helix** and gender sensitive approach to innovation ecosystems, the 7 RPOs, and 2 RFOs have then formed their own "CALIPER R&I Hub" engaging with national, regional, and local authorities, private companies, social innovation actors, and civil society (including feminist) organisations, as well as high schools and media. A co-creation process run in parallel with both internal and selected and motivated external actors which led to the design of GEPs at each RPO/RFO. While the plans keep their focus on generating internal sustainable change, they include collaborative initiatives to be implemented in synergy with external actors: the purpose is thus to promote and support gender equality inward at the CALIPER partner institutions, while having an outward and **multiplying effect** at the territorial level. Embedding GEPs co-design and implementation in regional/national ecosystems where the RPOs are active and promote synergies with quadruple helix stakeholders in R&I Hubs can work as a mean for achieving cultural and geographical tailoring of the measures.
 - **Suggested members of the R&I Hub:** identify the key stakeholders of your regional/national innovation ecosystem (including 1) academia and universities, 2) industry, 3) ministries/government, public sector and 4) civil society organizations) and engage them in the process.
 - Engaging interested and key external stakeholders in the GEP design and development process can be useful particularly on joint actions to achieve gender balance and gender sensitiveness in transfer to market of scientific research results, motivate young girls to embrace STEM studies, promote gender sensitive co-design of scientific research and tech products also via joint research projects co-funded by RPOs with Industry and social innovation partners, etc. This type of actions based on synergies with external stakeholders can be included in the GEP and generate at the same time internal change in RPOs/RFOs and outward gender equality change in the territorial context where they are active.



- **Geographic inclusiveness:** There is heterogeneity in the implementation of Gender Equality Plans across the EU and persisting structural barriers in R&I institutions which must be addressed, through a renewed approach⁴.
 - ❖ **How:** Develop methods for exchanging and implementing good practices and materials, tailored to individual organisations' needs for the development of inclusive GEPs. Provide support for reinforcing their networking in the area of gender equality and inclusiveness.
 - ❖ **Evidence from CALIPER project:** The CALIPER project adopts a wide thematic and geographical focus whereby the 9 participating RPO/RFOs are coming from Southern (Spain, Italy, Greece), Eastern (Romania, Croatia, Slovakia), and Western (Belgium) Europe, and non-EU countries (Georgia and Turkey⁵). Some of these institutions come from countries such as ES and BE, with more advanced policy frameworks on Gender in R&I and consequently already had some policies and measures in place that needed to be further strengthened. Others were at a very initial phase in implementing structural changes, often coupled with less favourable national policy frameworks. Having adopted highly participatory methodologies to conduct the internal assessment and the design of the GEPs, it has been essential to tailor and cater all measures to the needs and cultural/policy contexts. Also, an initial harmonised training and capacity building programme at the project level was adapted through the involvement of national trainers and delivered in the national languages at each RPO/RFO. It has been an important element for a geographically inclusive approach. CALIPER applied a context-sensitive approach to properly design/transform institutional measures/norms/regulations and processes while addressing the ERA gender related objectives. Involving 9 research organisation across 9 EU and non-EU countries strong links of collaboration created and new channels of communication have been opened enabling the sharing of knowledge across the Institutions. This enabled the exchange of knowledge and experience from the "advanced" organisations towards the "less advanced" ones and vice versa.

CONCLUSION

The present policy briefing described how the methodology adopted by the CALIPER project and its respective experience so far, contributes to the design and development of an inclusive GEP. In particular, the present documents aimed at elaborating further based on the CALIPER's knowledge experience so far at the core dimensions for setting up an inclusive GEP as they have been depicted at the recent EU policies.

This policy briefing is the first out of the three to be developed, using the knowledge and experience gained from the project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating an inclusive GEP (focus area of the 3rd policy briefing).

CALIPER RPOs/RFOs continue with the implementation of their GEPs. After the completion of the implementation phase, the second policy briefing will be developed and published, based on the new knowledge generated.

⁴[wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)

⁵ [Consortium – Caliper Project \(caliper-project.eu\)](#)



3.2 National Policy Briefings

3.2.1 Research Performing Organisations (RPOs)

3.2.1.1. University of Zagreb – Faculty of Electrical Engineering and Computing (FER – UZG)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation⁶. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators⁷. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration⁸ adopted in 2021 highlights the importance of GEPs as a tool “to achieve long-term and sustainable advancement towards Gender equality in R&I”.

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach⁹ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission’s (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for ‘inclusive’ Gender Equality Plans referring to “intersectoriality” as one of the dimensions along with intersectionality and geographic inclusiveness.

The H2020 CALIPER project was designed and is now being implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy briefing highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

⁶ [European research area \(ERA\) | European Commission \(europa.eu\)](#)

⁷ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](#)

⁸ <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

⁹ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](#)



Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at guiding national stakeholders in Croatia to effectively contribute to tailoring GEPs to specific domestic needs and developing quality assurance for GEPs.

THE CROATIAN CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Regarding the Croatian context, the [Report on the Implementation of National Policy for Gender Equality 2011 - 2015](#) shows that most of the measures regarding gender-sensitive education and equal opportunities on the market were implemented. But, for example, there were hardly any measures aiming for results on gender equality in the ICT sector. However, the [Report for 2019 of the Ombudsperson for Gender Equality](#), stating that the Government of Croatia plans to adopt a new national plan, the Gender Equality Strategy for the period 2021 – 2030. Furthermore, there are no mechanisms in place in Croatia to promote gender equality in Higher Education, but there were some attempts. In Croatia, the [Anti-discrimination Act](#) is in force since 2008. In the report of the Ombudsperson for Gender Equality for 2019, it is stated that most of the discrimination complaints are related to work, employment, and social security (46%). In the [National Act on Maternity and Parental Benefits](#), the rights regarding parental leave, part-time contracts, breastfeeding breaks, and financial support are prescribed. Parental leave is paid, transferable between parents or guardians and there is flexibility in the use of parental leave. Fathers are encouraged to take parental leave by getting two months extra. Concerning the [Labour Act](#), it contains articles about the protection of pregnant women, parents, and adoptive parents, their working hours, and leaves.

EVIDENCE ON UZG-FER GENDER EQUALITY POLICIES AND PRACTICES

UZG-FER implements employment protocols to avoid bias in recruitment. The criteria for scientific-teaching advancements are transparent, laid down by law, and the same for all public universities in the Republic of Croatia. The policy of equal pay in public institutions is determined by law. Salary does not depend on gender, which implies equal pay for equal complexity of work. UZG-FER implements fully the National Act on Maternity and Parental Benefits. There are also informal support mechanisms for female researchers when returning to work after maternity leave. However, the findings of the study suggest that maternity leave may be the cause of stagnation in the careers of female researchers, as they are less likely to publish papers after returning from leave. The Rules of Procedure of the Faculty of Electrical Engineering and Computing define decision-making bodies: the Dean and the Faculty Council. All female employees in scientific and teaching positions are members of the Council. In the decision-making process, the Dean and the Council are advised by committees and commissions of the Faculty. Women actively participate in committees and can thus influence decision-making. The institution has an unofficial commitment to women's inclusion in managerial positions. UZG-FER does not have a gender equality body. Efforts to use gender-neutral language whenever possible are visible on the internet, social media, and other internal documents. The Public Relations Department pays special attention to promoting successful women on social media and in the national media, however there is no digital communication and information channel designated to gender equality related topics. Currently, there is no guidance, no available literature, no checklists, and no teacher training on the integration of the gender dimension in the curriculum. There are no institutional guidelines for integrating the gender dimension into research. UZG-FER provides a wide range of organised support for students concerning student rights, prevention of discrimination, teaching, learning, psychological counselling, etc. It was noted that the percentage of female students in the total student population of FER is low at all levels, they comprise around 20%. UZG-FER has an established system for preventing and sanctioning cases of sexual harassment, which is laid down by law.



CALIPER RECOMMENDATIONS FOR THE DESIGN AND DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a “GEP Working Group”**
 - **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management
- **Perform a qualitative and quantitative gender analysis.**
 - **Suggested areas for data collection:** Human resources, institutional governance, research, teaching, student services, transfer to the market, institutional communication, and sexual harassment.
 - **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate and engage them in the GEP design and development process.
 - **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations
- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - Suggested methodology: develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis. For UZG-FER the most realistic was the third scenario, which was the only one developed.
 - Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Possible solutions • Resistances (including strategies to overcome them) • Opportunities.
- **Organise Multi Stakeholder dialogues** involving the R&I Hubs assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of UZG FER’s GEP design and development process.

Human Resources: In terms of Human Resources three main categories of actions were identified in order to strengthen existing measures and services for employees and to attract and retain female researchers.

The actions include:

- Ensuring continued equality for all employees in the selection, employment, work, and professional development.
- Supporting employees in balancing their professional and personal lives.



- Supporting researchers after parental leave, by providing equal opportunities for career advancement to increase productivity.

Institutional Governance: To address the low representation of women in high level positions and decision making bodies.

- Establish a Gender Equality Body (GEB). The suggested tasks of this body include monitoring the status of gender equality in the institution.
- Reporting on the state of gender equality. To have a clear view of the state of gender equality it is important to collect data and analyse them and publish relevant annual reports. This procedure will facilitate the tasks of the GEB.
- Develop a pilot program for the empowerment of female researchers. The pilot programme can target mainly young women researchers to remove obstacles and barriers in their academic and professional careers.

Institutional Communication: There is a popular perception in the STEM community that polytechnic schools educate students for “male occupations”. The actions below are suggested to tackle this issue:

- A digital communication channel to enhance visibility and promote the commitment of the Institution to gender equality and a bias free environment. The channel’s impact can be monitored and assessed. The ultimate goal is to attract more women to the so-called “male occupations”.
- Achieve gender neutral language in all the institutional legal documents by reviewing the relevant documents.

Teaching and Research: The lack of gender sensitive teaching practices can be addressed through:

- Integrating gender dimension in teaching to raise awareness and capacity to integrate gender in R&I. A trial period to test the integration methodologies is suggested.
- Establishing a promotional campaign on gender integration of the gender dimension in the R&I. The campaign can raise awareness and facilitate the trial period.
- Promoting the principles of gender equality in technology transfer by increasing visibility for women. The final goal is to expand the R&I ecosystem of the Institution and achieve further integration of Gender Equality principles into technology transfer practices.

Student Services: To adopt a gender perspective to the offered student services proposed policies include:

- Assess and revise the existing services for students to ensure equal access to information and support and strengthen the mechanism.
- Create targeted communication and information campaigns to abolish gender related stereotypes about STEM occupations and attract new female students.
- Organise dedicated events and invite female role models to participate

Sexism and Sexual Harassment: The Institution should build trust among the students, the academic and administrative staff to prevent and tackle potential sexual harassment incidents. Some examples include:

- Strengthening the existing system by revising the effectiveness of the existing regulations and protocols.
- Empowering academic and administrative staff as well as students by informing them about existing protocols and services

CONCLUSION

The present policy briefing describes the European and Croatian national context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, UZG FER’s GEP has been designed and described here for giving the example to other Research Performing Organisations operating in Croatia for setting up their inclusive GEP.



This policy briefing is the first out of the three to be developed by the CALIPER partner UZG -FER using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of the 3rd policy briefing).

UZG FER continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.1.2. Slovak University of Technology in Bratislava (STU BA)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation¹⁰. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators¹¹. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration¹² adopted in 2021 highlights the importance of GEPs as a tool “to achieve long-term and sustainable advancement towards Gender equality in R&I”.

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach¹³ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission’s (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for ‘inclusive’ Gender Equality Plans referring to “intersectoriality” as one of the dimensions along with intersectionality and, geographic inclusiveness.

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy brief highlights the main takeaways on the design & development of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

¹⁰ [European research area \(ERA\) | European Commission \(europa.eu\)](https://ec.europa.eu/research/era/)

¹¹ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022-en.pdf)

¹² <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

¹³ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022-en.pdf)



Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at guiding national stakeholders in Slovakia to effectively contribute to tailoring GEPs to specific domestic needs and developing quality assurance for GEPs.

THE SLOVAK CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

The government has adopted the [National strategy for gender equality in the Slovak Republic 2014-2019](#). One of its strategic areas and priorities is the number 3 on “Education, science and research”, whose aim is to improve the application of gender equality in education, science and research. This strategy includes the topics of work/life balance, gender sensitive research and scientific content and gender based violence among other issues. In addition, the government has introduced the competition “Employer friendly to the family, gender equality and equal opportunities. The issues of parental leave and sexual harassment are addressed in the national Labour Code. This national strategy also includes provisions about the integration of gender in the research content and in particular at point n. 3.4 “To deepen knowledge of existing forms of inequality between women and men by strengthening research in this area and gender statistics”. Also, the same strategy sets measures regarding the reduce of gender differences in the participation of women and men in decision-making positions. The main objectives are 1. To increase the representation of women in decision-making positions in political life, including their motivation and opportunities to candidate and participate; 2. Promote and support the women's entrepreneurship by creating systemic measures, including the work-life balance; and 3. Increase the representation of women in economic decision-making positions. In the Slovak legal framework, several laws are referring to discrimination. Two of them refer to equal rights for men and women specifically. These laws are the [Act. No. 311/2001 Coll. Labour Code](#) and the [Antidiscrimination Act](#) (Equal Treatment in Certain Areas and on Protection against Discrimination and the Amendment of Certain Laws).

EVIDENCE ON STU BA GENDER EQUALITY POLICIES AND PRACTICES

STU BA follows the institutional regulations, but most of them do not include specific policies targeting gender inequality issues. In terms of recruiting and hiring processes, as well as career progression, there are no gender sensitive policies and protocols. Also, no measures had been taken to encourage women to apply for decision making positions and the actions related to work/life balance need improvement. The institution does not collect any data related to gender equality status and the communication material on the official website and social media accounts present an imbalanced representation of men and women. STU BA had not applied actions to foster gender equality integration in its research activities. The reviewers of any scientific or research papers are not trained to detect and abolish biases, nor are there any evaluation forms/templates including a paragraph on gender equality in research teams and gender dimension in research content. However, they use the double-blind review process, to assess the expertise of the authors before publishing an article in a journal. In most of the areas, the institutional policies need updates and refinement to give more attention to the gender aspect.

CALIPER RECOMMENDATIONS FOR THE DESIGN & DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a “GEP Working Group”**
 - **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management
- **Perform a qualitative and quantitative gender analysis.**



- **Suggested areas for data collection:** Human resources, institutional governance, research, teaching, student services, transfer to the market, institutional communication, intersectionality, and sexual harassment.
- **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate adopting and engage them in the GEP design and development process.
 - **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations
- **Develop strategic change scenarios** to better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - Suggested methodology: develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis.
 - Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Scenario 1: Maximal resistance (including the possible solutions that would trigger high resistance and potential opportunities) • Scenario 2: Low resistance (including the possible solutions that would trigger low resistance and potential opportunities) • Scenario 3: Intermediate resistance (including the possible solutions that would trigger intermediate resistance and potential opportunities)
- **Organise of Multi Stakeholder dialogues** involving the R&I Hubs and assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of STU BA's GEP design and development process.

Institutional Governance: To address the lack of gender dedicated institutional policies it is necessary to:

- Develop the Extra Action Plan. The action steps may contain points that have the task of formally anchoring gender equality issues in the official documents of the Institution
- Set up a network of trained delegates. Appoint a main coordinator that can be a gender equality expert. Additionally, appoint delegates in certain departments. These delegates should oversee the observance of gender equality principles in the workplace, provide counselling for staff members, raise awareness of gender equality, organize events, and coordinate activities arising from the Extra Action Plan. The delegates can be responsible, among others, for revising documents in terms of gender-sensitive language.
- Develop and publish a methodological handbook focused on the problematic situations related to gender equality that employees and students experience at the institution and identify a list of problematic situations that require support actions. This can be started by the development of a



relevant questionnaire. Meeting of gender equality experts and interviews with staff of other universities with experience on this matter is recommended.

- Establish a gender and diversity monitoring system with specific indicators, evaluation methods and data collection methods, to audit the recruitment and hiring processes.

Human Resources: Here two main focus areas of action to achieve gender equality are recommended:

1) Recruitment: to detect and prevent employment biases the following action is suggested: Create a gender-sensitive protocol for recruitment and hiring to raise awareness about gender equality, to ensure equal hiring conditions and promotion processes at all levels.

2) Career breaks and job reintegration: Create programs for employee reintegration after parental leaves, with the final aim to raise the ratio of scientific papers and projects written and led by women.

Institutional Communication: The popular perception of male dominance in the STEM community, creates the need for gender neutral language in the internal and external communication content. The proposed activities include:

- The development of a communication strategy focusing on the development and implementation of promotional activities on equal chances and opportunities. The activities may be online or offline such as workshops, etc. Overall, the strategy should focus on raising awareness on gender bias among the employees and the students.

Research: The lack of gender sensitive research content and methods can be addressed through the:

- Integration of the gender dimension in final theses (bachelor's degrees, diploma, dissertations) in order to promote the importance of the matter during the research process and gradually incorporate this dimension in all final theses. As a result, there will be a higher engagement of supervisors and students on this issue.
- Integration of the gender dimension into research projects (as well as scientific publications), in order to produce gender sensitive scientific material and incorporate the gender perspective in all publications.

Teaching: There is a need for creating gender sensitive content and dedicated lectures. With the final goal of integrating the gender perspective in the curricula:

- Selected subjects can adopt the gender perspective and develop material, teaching methods and lectures. As a result, there can be a higher level of awareness among students, academics and the rest of the staff.

Transfer to market: Women are underrepresented in patent owning. To solve this issue the institutions should support all employees and especially women in technology transfer. Some measures to achieve this include:

- The creation of a website to inform all interested parties about the business activities of the institution.
- Meetings among employees to promote mutual cooperation and experience sharing and exchange among the relevant stakeholders.

Sexual Harassment: The cases of sexual harassment cases should be reported and monitored by an organised institutional mechanism. Measurements to achieve this include:

- A transparent complaint system to monitor the reported cases through a sustainable control mechanism.
- A sustainable communication plan and a raising awareness campaign with a two fold aim: 1) To inform about the reporting system, 2) To tackle the issue itself.



CONCLUSION

The present policy briefing describes the European and Slovak national context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, STU BA's GEP has been designed and described here for giving the example to other Research Performing Organisations operating in Slovakia for setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner STU BA using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

STU BA continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.1.3 Université libre de Bruxelles (ULB)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation¹⁴. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators¹⁵. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration¹⁶ adopted in 2021 highlights the importance of GEPs as a tool "to achieve long-term and sustainable advancement towards Gender equality in R&I".

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach¹⁷ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission's (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for 'inclusive' Gender Equality Plans referring to "intersectoriality" as one of the dimensions along with intersectionality, and geographic inclusiveness.

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the

¹⁴ [European research area \(ERA\) | European Commission \(europa.eu\)](https://ec.europa.eu/research/era/)

¹⁵ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022-en.pdf)

¹⁶ <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

¹⁷ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022-en.pdf)



institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy brief highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at guiding national stakeholders in Belgium to effectively contribute to tailoring GEPs to specific domestic needs and developing quality assurance for GEPs.

THE BELGIAN CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Belgium has several federal laws aiming at preventing sexism, harassment, discrimination and gender inequalities. The Act of May 10, 2007 to combat discrimination between women and men prohibits discrimination on the grounds of sex (including sex change). In 2014, that Act was modified to extend it to gender identity and gender expression to protect also transgender people who did not undergo surgery. The same year the Act of May 22, 2014 to combat sexism in the public space was also passed. In the employment area, Act of February 28, 2014 supplementing the Act of August 4, 1996 on the well-being of workers during the performance of their work includes the prevention of psychosocial risks at work including, in particular, violence and moral or sexual harassment at work.

French-speaking higher education in Belgium is a competence of the Wallonia-Brussels Federation (FWB). Therefore, French-speaking RPOs and RFOs, such as ULB, are under the responsibility of the French-speaking Ministries of Higher Education. In 2013, a network of Gender Contact Persons (GCP) was created in the six French speaking universities (one GCP per university) and this function was also introduced to the RFO Fund for Scientific Research (FNRS) the following year. The objective is to develop gender policies within the institutions and to promote gender equality throughout scientific careers. From 2018, a grant of 25,000€ per institution (indexed each year) has been made permanent by decree (Décret du 10 mars 2016 instituant le Comité Femmes et Sciences). That same decree made official the establishment of the 'Women and Science Committee', initially created in 2000 following the creation of the Helsinki Group on Gender in Research and Innovation. The 'Women and science committee' is a support committee for the FWB government, constituted by three members (including the Gender Contact Persons) of each FWB university, two members of the FNRS research funding body, and members appointed by the Ministries for Research, Higher Education, Womens' Rights and Equal Opportunities and their administration.

The Women and Science Committee is asked to improve gender equality in scientific and academic careers through four key actions. The first one concerns the formulation of opinion and recommendations about gender equality in the scientific and academic field. The second one focuses on the exchange of information and the dissemination of good practices between the six French universities, the FNRS and the responsible ministers in the French community. The third key action aims to facilitate the implementation of the European Charter for Researchers and a Code of Conduct for the recruitment of researchers regarding men and women equality. Finally, the Women and Science Committee contributes to the definition of the role and function of the positions of the French Community delegation in the Standing Working Group on Gender in Research and Innovation (SWG GRI), and thus reinforces the follow-up of these decisions at the European level.

Some soft law measures that have been implemented in FWB include recommendations on ad hoc leave, and propositions to modify the composition of juries and scientific committees to have a more balanced



gender representation. In relation to the integration of the gender dimension in teaching programs, the six French-speaking universities have an inter-university Master's program in Gender studies since 2014/2015: <https://www.mastergenre.be/>

EVIDENCE ON ULB GENDER EQUALITY POLICIES AND PRACTICES

ULB's gender equality and diversity policy is included in the areas of competence of a Vice-Rector and three university authorities' advisors (1 for the gender policy and 2 for the diversity policy). To sustain and promote this policy, an internal network of gender contact persons has been established in all the faculties and departments of the university administration. The gender policy aims at promoting equality, diversity and inclusion in different domains and is articulated in different action plans (the Diversity Plan for the university staff in collaboration with Actiris – the regional employment agency –, the EURAXESS HR Excellence in Research strategy, and the recently approved Gender Equality Plan in STEM designed within the CALIPER project) and several measures, among which the following are particularly worth mentioning and is summarized in the institutional Gender Equality Plan of ULB that is available on the University's website: <https://www.ulb.be/fr/egalite-des-genres/gender-equality-plan>

In the governance area, ULB has established gender parity in the candidacies for the representation of the personnel in the Plenary Assembly. Gender-disaggregated data are collected and monitored every year and a report on the state of gender equality at ULB is published annually. In the area of education, ULB participates in the Inter-university master's degree in gender studies and offers also a University certificate in gender and sexuality as part of its catalog of life-learning courses. The University also provides training on gender-sensitive teaching to its teaching staff once a year. In the area of research, the interdisciplinary research structure on gender, equality and sexuality (STRIGES) gives strong visibility to gender studies conducted at ULB and the University also organizes with the University of Lausanne the first international francophone summer PhD school in gender studies (BRULAU). In the area of human resources, the 'Cascade measure' aims at fighting against the "leaky pipeline" phenomenon in academic careers by establishing a gender proportion in career promotions. Moreover, there must be at least one third of members of each gender in the commissions involved in academic recruitment and promotion and a gender-balanced proposal concerning the reference persons likely to be contacted by these commissions. An awareness-raising video to prevent biases in recruitment and promotion processes is also disseminated by the University. To improve work-life balance, ULB offers to its staff and students the use of University's nurseries and activities for children during school holidays. In relation to the student community, ULB recognizes a special status to students who are pregnant and students who are parents to adapt their study curriculum. Transgender students have also the possibility to use a common or preferential first name upon registration. A center to accompany and support students in case of harassment has also been created. In the area of communication, the University has published recommendations for the use of inclusive communication in institutional materials and has named lecture halls with the name of remarkable women in line with the history and values of ULB.

Not being a technical university, ULB has designed and developed its GEP for its two STEM faculties (Faculty of Sciences and Polytechnic School of Brussels). Although some measures target the overall institutional context, many of the recommendations presented below concern the STEM fields.

CALIPER RECOMMENDATIONS FOR THE DESIGN AND DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a "GEP Working Group"**



- **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management and different services of the organization.
- **Perform a qualitative and quantitative gender analysis.**
 - **Suggested areas for data collection:** Human resources, institutional governance, research, teaching, student services, transfer to the market, institutional communication, intersectionality, and sexual harassment.
 - **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research, interviews and surveys.
- **Set up a Research & Innovation (R&I) Hub:** Following a quadruple helix approach, identify the key stakeholders of your regional/national innovation ecosystem (including 1) academia and universities, 2) industry, 3) ministries/government, public sector and 4) civil society organizations) and engage them in the GEP design and development process. For this purpose, gather information through desk research, social network analysis and interviews with these key stakeholders and identify the regional/national innovation ecosystems in which they operate adopting and engaging them in the GEP design and development process.
- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - Suggested methodology: develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis.
 - Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Scenario 1: Maximal resistance (including the possible solutions that would trigger high resistance and potential opportunities) • Scenario 2: Low resistance (including the possible solutions that would trigger low resistance and potential opportunities) • Scenario 3: Intermediate resistance (including the possible solutions that would trigger intermediate resistance and potential opportunities)
- **Organise Multi Stakeholder dialogues** involving the R&I Hubs and assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders.
 - At ULB, the stakeholder dialogues were useful in terms of networking and dissemination, but they were also time consuming and the discussions were sometimes too abstract, which is normal when first contacts are being established. It is however important to identify specific forms of collaboration in order to further engage the R&I Hub members in the university activities.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of ULB's GEP design and development process Human Resources: To ensure a more gender equal and bias free environment, the proposed measures include:

- Drafting a toolkit to avoid unconscious bias in academic recruitment processes. This can be done by examining the current policies, identifying the biases and the existent good practices in the literature. The final step includes disseminating the toolkit within the Institution.



- Assessing the feasibility of creating a standardised policy for career breaks due to childcare leaves, in selection procedures for academic vacancies. This can be achieved by first conducting a study on the current status, gathering the conclusions and then publishing the results to inform the staff and the students.
- Assessing the feasibility of postdoctoral contract extension due to childcare leaves. This can be achieved by identifying the different leave situations and then mapping the existing good practices and conditions for a contract extension. Next, the organisation should identify and consult with internal and external sources of funding for a contract extension. **Governance:** To guarantee the sustainability of the gender equality policy initiated and to address the low representation of women in decision making bodies, the proposed measures include:
- Establishing a Gender+ commission in the STEM faculties giving them a specific mission, clear tasks and activities in the promotion, monitoring and evaluation of the gender equality policy at faculty level.
- Setting up new and improving existent gender indicators in STEM at different levels of the organization (e.g. faculties, departments, services). First, the institution should assess the existing data and define relevant indicators. Then, the process of collecting data for these indicators should be define. It is also important to draft annual internal reports and disseminate them.
- Proposing a gendered-balanced participation in advisory boards.

Research: To adopt gender sensitive policies in the focus area of research, the proposed measures include:

- Disseminating guidelines on the inclusion of sex and gender dimension in STEM research. To achieve this, a working group can be established to identify the possible guidelines, the target audience and appropriate communication channels.
- Organising an exhibition to raise awareness on the sex and gender dimension in STEM research. To achieve this, a working group can be established composed of both internal and external stakeholders, to define the content and organise the exhibition's inauguration, including a top management's speeches and the presentation of the aforementioned guideline.
- Setting up gender targets in STEM PhD juries. To achieve this, a working group can be established in the faculties to set the targets and collect relevant data and indicators. They should discuss the targets and communicate them internally, and finally monitor and evaluate their efficiency and sustainability.

Teaching: The lack of gender sensitive teaching practices can be addressed through:

- Publishing a guide on gender sensitive teaching focusing on academic staff, Then, the guide should be integrated into STEM education practices.
- Integrating the sex/gender and diversity perspective into STEM curriculum competency frameworks. To achieve this, a consultation process with key stakeholders needs to be carried out to define the specific formulation. Therefore, the key stakeholders should be identified and meetings conducted to define and establish the institutional framework.

Students and student Services: The number of female students enrolled in STEM studies can be improved with the following measures:

- Organization of a new science and technology training for future secondary school teachers. The goal is, first, to examine the possibility of designing a new interdisciplinary science and technology qualification program to teach at the upper secondary level for science teachers and, second, design and implement it. Identification of key stakeholders and the establishment of a working group is needed for the consultation process.



- Gender technical assistance can be foreseen within the institution for the discussion of surveys' results, the identification of gender-related gaps in science outreach activities, and the integration of the gender+ perspective in science outreach activities.
- The organisation of events dedicated to women role models in STEM. Inviting both internal and external stakeholders from the local and national ecosystem can increase the event's impact.

Communication: The popular perception of male dominance in the STEM community, creates the need for inclusive internal and external communication. The proposed activities include:

- Hands-on training on inclusive communication for STEM webpages' administrators based on the institutional guidelines on inclusive communication to solve doubts on how to implement it.
- Review and update of the communication material (website and social networks).
- A dedicated web page for the gender+ measures of STEM faculties, and regular feeding of it with faculty gender+ policy and initiatives.

Sexism and Sexual Harassment: Measurements to improve the methods of combating sexual harassment include:

- Developing of training on discrimination and harassment targeting STEM faculty departments/services leaders, to encourage them to improve their skills in order to contribute to the prevention and better management of discrimination and harassment cases.
- Create a permanent poster campaign to inform about the existing services and protocols to prevent and/or report cases. This action may include the establishment of a working group to design the posters including key messages, the description of protocols and services, and the visual style.

CONCLUSION

The present policy briefing describes the European and Belgian national context as well as ULB's institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the CALIPER project. Based on the abovementioned context, ULB's GEP has been designed and described here for giving the example to other Research Performing Organisations operating in Belgium for setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner ULB using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

ULB continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.1.4 National Technical University of Athens – School of Electrical and Computer Engineering (ECE – NTUA)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation¹⁸. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

¹⁸ [European research area \(ERA\) | European Commission \(europa.eu\)](https://ec.europa.eu/research/eu-research-area-priority-4/)



Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators¹⁹. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration²⁰ adopted in 2021 highlights the importance of GEPs as a tool “to achieve long-term and sustainable advancement towards Gender equality in R&I”.

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach²¹ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission’s (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for ‘inclusive’ Gender Equality Plans referring to “intersectoriality” as one of the dimensions along with intersectionality, and geographic inclusiveness.

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy brief highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at providing guidance to national stakeholders in Greece to effectively contribute to tailoring GEPs to specific domestic needs and developing quality assurance for GEPs.

THE GREEK CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

The Greek constitution started to reform in 1974 after the restoration of Democracy. The first law reform towards gender equality happened in 1983 regarding the family law. In 1982, the UN International Convention was signed by Greece, for the elimination of all Forms of Discrimination against Women (CEDAW) (Law 1342/83) but also ratified the European Social Charter with Law 1426/84. The action plan for the integration of the gender equality policies in all sectors of action (gender mainstreaming), was first presented in the National Action Plan for Equality (2001-2006), which was devised by the General Secretariat for Demography and Family Policy and Gender Equality. The National Program for Substantive Gender Equality (2010-2013) and the National Action Plan 2016-2020 for Gender Equality was implemented. The more recent Greek Strategy for Gender Equality 2016-2020 (GSGE) and Law 4606/2019 provide the content of Gender Equality Plans as well as provisions related to gender sensitive budgeting. With Law 4589/2019 the establishment of a Committee for Gender Equality in each university was foreseen. The law also states that higher education institutions must ensure the promotion of gender equality at all levels and processes of

¹⁹ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)

²⁰ <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

²¹ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)



academic life. However, no specific mechanisms for promoting the underrepresented gender in Higher education are in place yet. Now the National Action Plan for Gender Equality 2021-2025 is being implemented, which highlights 4 expected axes: gender-based violence, decision-making centres, the labour market and sectoral policies (education, health, culture).

EVIDENCE ON ECE NTUA GENDER EQUALITY POLICIES AND PRACTICES

The Greek legal framework needs further improvement and that reflects the institutional framework of ECE NTUA. ECE-NTUA doesn't have specific gender-sensitive protocols for recruitment and hiring. Particular processes for hiring permanent personnel (administrative, research, academic, technical) exist, but they are not explicitly designated by the School, rather than the Ministry of Education. Candidates are assessed on their capabilities and experience, while the gender dimension is not considered. The measures implemented in NTUA regarding parental leaves are the ones established by laws, presidential decrees and EC directives. Note, however, that these measures apply only to salaried/permanent staff (i.e. faculty, administrative, technical, laboratory staff) or temporary staff under a fixed-term contract. The institution has a general commitment to gender equality, but there is no official monitoring on the gender equality situation, except for demographics. Also, there are no actions on mentoring services for students. The School is in the process of creating the Committee for Gender Equality at an institutional level. The communication material is relatively balanced representing both genders, but there are no gender campaigns to promote female researchers in particular. Regarding research activities, there are no specialised practices to integrate gender dimension and gender analysis. Lastly, the institution doesn't have a specific policy for sexual harassment, and handles incidents based on the national legal framework.

CALIPER RECOMMENDATIONS FOR THE DESIGN & DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a “GEP Working Group”**
 - **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management
- **Perform a qualitative and quantitative gender analysis.**
 - **Suggested areas for data collection:** Human resources, institutional governance, research, teaching, student services, transfer to the market, institutional communication, intersectionality, and sexual harassment.
 - **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate adopting and engage them in the GEP design and development process.
 - **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations
- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP



- Suggested methodology: Develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis. For ECE NTUA the most realistic was the third scenario, which was the only one developed.
- The d main components of the scenarios included: • Situation • Main problems • Objective(s) • Possible solutions • Resistances (including strategies to overcome them) • Opportunities.
- In the case of ECE NTUA, the strategic change scenarios were useful for brainstorming but a bit repetitive, and as a result, they didn't have a significant added value to the construction of the GEP. No significant resistances were encountered at this stage.
- **Organise Multi Stakeholder dialogues** involving the R&I Hubs assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders.
 - ECE NTUA organised two online stakeholder dialogues regarding gender equality strategies in research and innovation. The first one focused on Management, Human Resources, Sexual Harassment & Gender-Based Violence and Research while the second one focused on Institutional communication, Transfer to the market, Teaching & Student Services and Intersectionality.
 - The different types of organisations that participated (e.g. universities, private sector, NGOs, brought different problems and perspectives (discussing also in smaller groups), leading, indicatively, in the following approaches (indicatively):
 - Increasing the women in STEM and the positions for women researchers through actions which promote the profession of engineer and future career opportunities, via the promotion of role models or even by exploiting exchange programs (ERASMUS, AIESEC) to attract female researchers from abroad.
 - The development of measures regarding the balance between work and family life with the support of research centers and best practices from other universities
 - Setting up a mechanism for dealing with incidents of sexist behavior, exploiting guidelines from other universities' gender equality committees and civil society organisations.
 - Using of gender-sensitive language in all forms of communication. Organisation of trainings for the faculty in this direction and get support through discussions with universities abroad.
 - Supporting the integration of women in the labour market through mentoring from professional women in the field, while also directly engaging the private sector.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of ECE NTUA's GEP design and development process Human Resources: In this focus area, especially regarding recruitment and selection and work/life balance, in order to improve the policies and ensure a more gender equal and bias free environment, the proposed measures include:

- Setting up internal targets regarding female representation among students, researchers, academic staff, and recruiting boards. The indicators should be monitored regularly, reporting the number of women.



- Establishing a formal strategy against biases and sexism. Top and middle management should be involved in order to contribute to the structure, approval and finally establishment of the strategy.
- Publishing a Post-Doc Research Guide, on work/life strategy at the institutional level. It can be developed by a relevant Committee or secretariat. Involvement of the high and middle level management is critical. Data collection should follow, to facilitate the monitoring of the guide's implementation and efficiency and the respective updating process.

Institutional Governance: To address the low representation of women in decision making bodies, proposed measures include:

- Creating a Gender Equality Office to support, lead, coordinate and embed gender equality and diversity actions at the Institutional level. This office can be responsible for organising gender related events and drafting gender related reports. The office members can supervise the GEP implementation.
- Collecting gender disaggregated data including an annual update of the data/indicators. The Institution can first establish a data collection framework for gender equality with quantitative and qualitative aspects, ensuring participation of the Institution's relevant stakeholders and cooperation with the other relevant units and committees

Institutional Communication: The popular perception of male dominance in the STEM community, creates the need for gender neutral language in the internal and external communication content. The proposed activities include:

- Developing and applying a "Guide of using non-sexist language in administrative documents", to ensure that official communications use gender-balanced and gender sensitive language. This can be achieved through training about the Guide from the respective body (for example the Gender Equality Office), with the involvement of the top and middle management.

Research: In order to adopt gender sensitive policies in the focus area of research, proposed measures include:

- Create a framework for measuring the inclusion of gender in research content, and initiate discussions on how to improve performance at the Institutional level. An example for monitoring performance can be the number of thesis/PhD/research projects with a gender dimension in their content.

Teaching and student services: The lack of gender sensitive teaching and student services can be addressed through:

- The integration of gender-related topics in selected undergraduate and postgraduate courses. The content of the course can be designed in collaboration with faculty and teaching assistants, collecting feedback from the students.
- The organisation of seminars on gender related topics for students, to improve awareness.

Transfer to the market: To promote female entrepreneurship, proposed measures include:

- The creation of an Alumni Network, to enhance the communication between the market and the Institution in order to establish more adequate transfer to the market. This network should adopt a gender perspective and support female researchers entering the market. The network can have annual meetings and support mentoring activities.

Sexism and Sexual Harassment: Methods to combat sexual harassment may include:

- Establishing a formal mechanism dealing with cases of sexual harassment and gender violence, to improve the reporting and resolution of harassment incidents. The mechanism can operate within the following pillars: Cooperate with the Gender Equality Office; Raise awareness on what is sexual harassment and sexism at work; Organise training on how to avoid unconscious sexist and gender



bias behaviour; Develop a formal mechanism offering mediation services; Establish an effective reporting process; Follow up on complaints immediately. The mechanism should be disseminated through the School's website and social media.

Intersectionality: To introduce the term of intersectionality, proposed measures include:

- Development of a questionnaire, on the definitions, characteristics and information about intersectionality to assess students' knowledge and familiarity with the term. A key action can be informing students associations about the questionnaire ensuring maximum participation.

CONCLUSION

The present policy briefing describes the European and Greek context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, ECE NTUA's GEP has been designed and described here for giving the example to other Research Performing Organisations operating in Greece for setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner ECE NTUA using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

ECE NTUA continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.1.5 Institute for Research in Biomedicine (IRB)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation²². The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators²³. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration²⁴ adopted in 2021 highlights the importance of GEPs as a tool "to achieve long-term and sustainable advancement towards Gender equality in R&I".

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach²⁵ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

²² [European research area \(ERA\) | European Commission \(europa.eu\)](https://ec.europa.eu/research/era/)

²³ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022-en.pdf)

²⁴ <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

²⁵ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022-en.pdf)



For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission's (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for 'inclusive' Gender Equality Plans referring to "intersectoriality" as one of the dimensions along with intersectionality, and geographic inclusiveness.

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy brief highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at providing guidance to national stakeholders in Spain to effectively contribute on tailoring GEPs to specific domestic needs and developing quality assurance for GEPs.

THE SPANISH CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

The Spanish legal framework has many provisions to ensure gender equality. The Spanish constitution contains articles that ensure the freedom and equality of individuals, and the equality before the law regardless of their sex, gender, religion, or other social conditions. In the last twenty years, Spain has passed laws regarding gender equality in employment, training, professional promotion, and working conditions, inclusion of the gender dimension in research and elimination of Gender Based Violence (GBV) in educational institutions. More recently, in October 2020, two crucial Royal Decrees were published in the frame of gender issues and gender equality plans. In particular the Real Decreto ley 901/2020 regulating the content of equality plans and their registration, and the Real Decreto 902/2020 stating the principle of transparent remuneration and obligation of equal remuneration of equal value work. Concerning the Regional level (Catalonia), L 17/2015 ensures equality between men and women, L 11/2014 guarantees the rights of LGBTI people, and **L 19/2020 ensures equality and non-discriminatory treatment**. More specifically, in Higher Education Institutions there are laws about equal representation of women and men and since 2011 GEPs are mandatory for the public research bodies. Also, there are many existing policies regarding parental leave. At National level LOIMH 3/2007 applies and in particular article 25 about "Equality in the field of higher education", which states that "In the field of higher education, public administrations in the exercise of their respective competences will promote teaching and research on the meaning and scope of equality between women and men". Regarding sexual harassment, the national legal framework contains "Specific measures to prevent sexual harassment and harassment based on sex at work". According to the national legal framework "Companies must promote working conditions that prevent sexual harassment and harassment on the basis of sex and arbitrate specific procedures for their prevention and to channel the complaints or claims that may be made by those who have been subject of this matter".

EVIDENCE ON IRB GENDER EQUALITY POLICIES AND PRACTICES

IRB has set up measures and protocols for recruitment **to ensure equal employment and opportunities**, but it is necessary to better communicate these measures among the scientific community. In terms of career progression with a gender perspective, no protocols and guidelines are in place. In the sub-area of well-being



and work-life balance, the Institute follows the national laws and regulations and has various initiatives set in place. In relation to the decision-making bodies, there is an underrepresentation of female participants because of the low number of female Principal Investigators. The IRB has an Equality and Diversity Committee (EDC) which currently comprises 11 members representing the majority of the positions in the institute. **In regard to institutional communication, efforts are made to give more visibility to gender equality actions especially on the institutional website/ intranet.** In relation to the research content sub-area, IRB groups are aware of the gender perspective in the content of their research. With regards to the student services, there are some initiatives that contribute to giving visibility to women at IRB and to encouraging young girls to pursue STEM studies. At the moment, there are no initiatives aimed at counseling the researchers and young scientists with a gender-sensitive approach. IRB has set up measures and protocols addressing sexual and gender discrimination, the main protocol is available in Spanish and English to all employees on the Institute's intranet. IRB is channeling efforts into transferring research results into the market but currently there is no specific system to measure and monitor gender-related aspects. Finally, through experience gained in recent years the IRB through actions of the Equality and Diversity Committee is evolving from a binary approach towards a broader, intersectional approach, taking into account other social aspects that converge and influence gender equality, such as social class, race, existence of disabilities, sexual or gender orientation, among others.

CALIPER RECOMMENDATIONS FOR THE DESIGN AND DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a “GEP Working Group”**
 - **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management
- **Perform a qualitative and quantitative gender analysis.**
 - **Suggested areas for data collection:** Human resources, institutional governance, research, teaching, student services, transfer to the market, institutional communication, intersectionality, and sexual harassment.
 - **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate adopting and engage them in the GEP design and development process.
 - **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations
- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - **Suggested methodology:** develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis.



- Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Scenario 1: Maximal resistance (including the possible solutions that would trigger high resistance and potential opportunities) • Scenario 2: Low resistance (including the possible solutions that would trigger low resistance and potential opportunities) • Scenario 3: Intermediate resistance (including the possible solutions that would trigger intermediate resistance and potential opportunities)
- **Organise Multi Stakeholder dialogues** involving the R&I Hubs and assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders.
 - At IRB the stakeholder dialogues enhanced the networking activities of the institute and facilitated the mapping of the external situation. IRB provided roadmaps and instructions to support the process for R&I Hub members who did have a solid knowledge regarding gender equality issues, also facilitating the communication among members of the HUB.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of IRB's GEP design and development process Human Resources: To ensure a more gender equal and bias free environment, the proposed measures include:

- Reviewing and updating existing recruitment policies and guidelines from a gender perspective leading potentially to cultural change.
- Conduct a salary audit regarding equal pay. The salary system should be analysed in order to detect any injustices. An action plan on unequal pay, including an analysis of the reasons leading to this phenomenon, should be structured to facilitate the process.
- Develop a training on the importance of work/life balance. The needs of the institution can be identified, and the training should reflect upon these needs. The implementation of the training sessions should be followed by an assessment process. Dissemination of this activity is very important to raise awareness internally.
- Developing parental leave and work/life balance guide(s). First, the review and update of existing policies in this area is needed, followed by the development of the final structure and dissemination of the Guide to the employees. The Guide should be regularly assessed and updated.

Institutional Governance: To address the low representation of women in decision making bodies, the measures include:

- A Mentoring Programme: To promote career progression reflecting a commitment to the career development of women. The programme should take into account all potential existing information and processes related to mentoring and collect feedback from the scientific community regarding desired practices to be implemented. The programme can contain leadership training sessions, peer coaching groups, and a list of senior role models to participate in mentoring and coaching activities.
- Preparing an internal regulation to govern the Equality and Diversity Committee, by providing a document regulating the functioning of the Committee and the roles of its members. Preparation, approval and dissemination of the new regulation on the institutional Intranet are necessary.

Institutional Communication: The popular perception of male dominance in the STEM community, creates the need for gender neutral language in the internal and external communication content. The proposed activities include:



- To give internal and external visibility to the new Gender Equality Plan and raise institutional awareness on equality and diversity. An important step is to connect the necessary documentation with the pertinent legal bodies, both at the national and regional levels.
- To create and promote manual/guidelines in inclusive language
- To develop a checklist/guideline for posting and checking communication material (posts, templates, announcements, etc.) ensuring the gender sensitivity of external communication on social media platforms.
- To organise and participate in advanced training on inclusive language, integrate an inclusive (gender, diversity, intersectional) approach into oral and written communications and apply the recommendations.
- To promote institutional engagement to equality and diversity topics (videos, institutional equality day, printed materials, among others). Related activities can include an Equality and Diversity Communication Plan, with the aim to promote news, role models, and events, among others, the use of an institutional Blog for gender and equality topics, disseminating updated pictures of Equality and Diversity Committee meetings and members, and visual material and campaigns to promote gender and equality.

Research: In order to adopt gender sensitive policies in the focus area of research, proposed measures include:

- Offering training sessions on the integration of the gender dimension into research, to understand the importance of gender dimension in research and innovation.
- Creating and consolidating a protocol for planning and developing internal seminars, promoting and assuring the participation of speakers, chosen considering the gender perspective.

Young Scientists: To help young scientists in their career progression from a gender perspective, proposed actions include:

- Reinforce equality and diversity topics in onboarding sessions, giving all newcomers a general overview of efforts made in matters pertaining to equality and diversity. This can be achieved by developing a checklist of topics covering gender and equality and a mandatory presentation to be included in onboarding sessions.
- Integrate gender perspective training in the transversal PhD programme. Include a mandatory course to inform about existing initiatives addressing equality and diversity.

Sexual and Gender Harassment: Measurements to improve the methods of combating sexual harassment include:

- Developing regular internal training on Sexual & Gender Harassment, to increase awareness and capacity to prevent and recognise sexual harassment.
- Review and update protocol on Sexual Harassment to prevent and eradicate behaviours related to sexual and gender harassment. Proper dissemination of the policies is vital.

Intersectionality: To strengthen the culture of intersectionality in the organisation, proposed measures include:

- Developing awareness raising campaigns on Intersectionality to develop a critical perspective on intersectional topics, providing the grounds to rethink everyday practices.
- Organising an advance training session on gender and diversity topics for members of the Equality Commission, to provide an advanced perspective on the concept of equality and diversity.

CONCLUSION

The present policy briefing describes the European and Spanish national context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external



and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, IRB's GEP has been designed and described here for giving the example to other Research Performing Organisations operating in Spain for setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner IRB using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

IRB continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.1.6 Yasar University (YU)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation²⁶. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators²⁷. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration²⁸ adopted in 2021 highlights the importance of GEPs as a tool "to achieve long-term and sustainable advancement towards Gender equality in R&I".

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach²⁹ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission's (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for 'inclusive' Gender Equality Plans referring to "intersectoriality" as one of the dimensions along with intersectionality, and geographic inclusiveness. .

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an

²⁶ [European research area \(ERA\) | European Commission \(europa.eu\)](#)

²⁷ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)

²⁸ <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

²⁹ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)



additional inclusive approach, this policy brief highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at providing guidance to national stakeholders in Turkey to effectively contribute to tailoring GEPs to specific domestic needs and developing quality assurance for GEPs. Although Turkey is a non-EU country, the institutions are willing to adopt gender equality policies in order to achieve institutional change. Yasar University sets an example.

THE TURKISH CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

In Turkey there are no specific legal texts/acts relevant to the field of gender equality policies in higher education. Gender equality is addressed within a broader concept of anti-discrimination and equality in various laws and acts including the Turkish Constitution. In 2015 a "Gender Mainstreaming" strategy was prepared by the Council of Higher Education. In 2015, the Council of Higher Education established a gender studies in academia unit which aims to raise the awareness of the next generation of researchers on gender equality through various activities including lectures, seminars and policies. The unit is coordinated by seven prominent female researchers from prestigious higher education institutions in Turkey. Dedicated policies of increasing women's participation in the research were recently adopted by the Scientific and Technological Research Council of Turkey. Female employment is a priority area for national strategic documents and dedicated provisions (even if not mandatory) exist in terms of quotas in management positions. However, female leadership in companies constitutes only 13.40% in Turkey. The rate falls even below when it comes to female ownership of firms and female top management, with only 3.9%. Also, maternity leave is regulated, while paternity leave is not foreseen by the law. An ad hoc legislation is foreseen concerning sexual harassment. [Turkish Labor Law \(No 4857\)](#) contains clauses on sexual harassment and regulates the actions to be taken by the employer as well as the rights of the employee to prevent sexual harassment or other forms of harassment in the workplace. The share of female STEM students is higher than the male one in the science oriented High Schools called FEN Lisesi, but then it dramatically decreases in Higher Education. Particularly low is also the share of women among founders and leaders of start-ups (19%). No regulations are in place in terms of promoting the integration of gender as a scientific dimension in research both at national and regional level.

EVIDENCE ON YU GENDER EQUALITY POLICIES AND PRACTICES

Recruitment and hiring are based on the principles set out in the document for procedures and principles of academic and administrative staff 'regardless of gender. There is no support for career progression for the underrepresented gender at the institutional level. In the sub-area of retention, the reasons for resignation include spouse related leaves, changing cities for the educational futures of children, childcare and elderly care while resignation due to marriage is in the first place for female employees. The main challenge in the area of institutional governance is that the institution has a need for more women in decision-making bodies and leadership positions. While the number of female deans is high, the senior management - general secretary, financial affairs, rector and vice presidents - are all males. The representation of men and women in the communication material is balanced, but there are not many activities to raise awareness about gender equality issues. In the sub-area of research content, YU lacks funds for gender research, and there are no guidelines on the integration of gender analysis into research. Regarding student services, there is no provision for the integration of gender equality in the orientation programmes. The university does not carry out tailored actions to increase awareness around the issue of gender-based offences and harassment.



Finally, there are no existing institutional measures with regards to intersectionality and there is a lack of awareness.

CALIPER RECOMMENDATIONS FOR THE DESIGN AND DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a “GEP Working Group”**
 - **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management
- **Perform a qualitative and quantitative gender analysis.**
 - **Suggested areas for data collection:** Human resources, institutional governance, research, teaching, student services, transfer to the market, institutional communication, intersectionality, and sexual harassment.
 - **Tools:** Set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate adopting and engage them in the GEP design and development process.
 - **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations
- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - Suggested methodology: develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis.
 - YU developed all three scenarios and examined their probability to happen. After their evaluation, the most realistic seemed to be the third scenario, which was the one they used to develop their GEP.
 - Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Possible solutions • Resistances (including strategies to overcome them) • Opportunities.
- **Organise Multi Stakeholder dialogues** involving the R&I Hubs assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders.
 - The stakeholder dialogues in the case of YU were fruitful and strengthened its local network. They achieved strong engagement, since gender equality is an important issue in Turkey these days, and different types of stakeholders are trying to adopt gender policies.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the target set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of YU’s GEP design and development process.



Human resources: In this area, the subtopics are recruitment selection and career progression. In order to adopt gender sensitive policies, proposed measures include:

- Adopting gender-sensitive recruitment procedures. The regulations should be monitored and updated.
- Revision of the promotion criteria of staff, to establish transparent processes and develop guidelines and training for the involved personnel. Monitoring of the process is required.
- Support measures for underrepresented gender at the institutional level, through dialogue meetings with the top and middle management and the HR department, to organise co-creation activities for the development of an institutional mentoring program for the female researchers.

Institutional governance: To address the low representation of women in high level positions and decision-making bodies, the measurements include:

- Setting up a Gender Equality Body (GEB) appointing specific tasks to its members and organising an awareness raising campaign.
- Collection of gender disaggregated data by the responsible personnel. The collection should be done through a dedicated process, accompanied by monitoring and evaluation reports.
- Increase awareness of the top-level management regarding gender balance in decision making processes through planning, development, implementation, monitoring and reporting of activities such as meetings with top management, gender equality training and webinars.
- Organising an empowerment programme with a collaborative approach with the involvement of academic and administrative units. A pilot implementation phase can be initiated. The programme should be monitored, evaluated, and revised/enriched.

Research: In order to adopt gender sensitive policies in the focus area of research, proposed measures include:

- Integration of gender into the institutional strategic plan and institutional funding mechanisms using targets and measures.
- The organisation of awareness raising activities (workshops, training, webinars) on the application of gender analysis and gender dimension into research
- Establish a Gender Researchers Group at the Institution. The group's structure can be designed by gender experts and potential researchers who would like to be a member of this group. Identification of the goals, activities and sub-working groups is needed to implement the research project.

Teaching: The lack of gender sensitive teaching practices can be addressed through:

- Development and adoption of principles and guidelines for integrating the gender dimension into curricula and teaching.
- Training of academic staff on gender sensitive teaching and pilot implementation of the curriculum with a gender dimension in one department from each faculty. The training and the pilots should be monitored and assessed for further improvement.

Institutional communication: The popular perception of male dominance in the STEM community, creates the need for gender neutral language in the internal and external communication content. The proposed activities include:

- Development and implementation of gender-sensitive institutional communication guidelines. In collaboration with relevant academic and administrative departments, desk research can be conducted for the components of the document. The presentation of the document to top management and the adoption of the guidelines should follow. The document should be implemented, monitored, and evaluated.
- Training the relevant staff members based on the aforementioned guidelines.



Sexual harassment: Proposed measures to combat sexual harassment include:

- Development of a policy document against sexism and sexual harassment and be officially adopted.
- Establishment of Gender Based Discrimination, Violence and Sexual Harassment Prevention Unit. It should provide information about the definition of sexual harassment and the procedures of handling such cases, as well as the responsible commission. The sexual harassment subject is recommended to be integrated into all orientation programmes.

CONCLUSION

The present policy briefing describes the European and Turkish national context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, YU's GEP has been designed and described here for giving the example to other Research Performing Organisations operating in Turkey for setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner YU using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

YU continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.1.7 Salento University (UNILE)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation³⁰. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators³¹. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration³² adopted in 2021 highlights the importance of GEPs as a tool "to achieve long-term and sustainable advancement towards Gender equality in R&I".

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach³³ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident

³⁰ [European research area \(ERA\) | European Commission \(europa.eu\)](https://ec.europa.eu/research/era/)

³¹ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022_en.pdf)

³² <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

³³ [wp-11-widening-participation-and-strengthening-the-european-research-area horizon-2021-2022 en.pdf \(europa.eu\)](https://ec.europa.eu/research/era/wp-11-widening-participation-and-strengthening-the-european-research-area-horizon-2021-2022_en.pdf)



from the European Commission's (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for 'inclusive' Gender Equality Plans referring to "intersectoriality" as one of the dimensions along with intersectionality, and geographic inclusiveness.

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy brief highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at providing guidance to national stakeholders in Italy to effectively contribute on tailoring GEPs to specific domestic needs and developing quality assurance for GEPs.

THE ITALIAN CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

In Italy, gender equality is established within the Constitution and a set of ordinary laws which promote equal opportunities and contrast gender discrimination. A dedicated Committee was established for implementing the principles of equal treatment and equal opportunities of workers, however, members of such Committee do not receive any kind of remuneration for the work carried out and this inevitably affects the work of the Committee itself. No mechanisms at National/Regional levels are in place for promoting the under-represented gender in Higher Education, but public Universities as all other Public Administration bodies are requested to set up dedicated bodies (CUG- Comitato Unico di Garanzia) in charge of designing and implementing triannual Positive Action Plans, to eliminate discrimination and favour equal opportunities. One of the most relevant provisions in the law n. 125/1991, in which the Italian legislator introduced "positive actions" as tools to achieve equal opportunities and the distinction between "Direct discrimination" and "Indirect discrimination". Some measures are in place for supporting maternity and paternity leave, but the more recent law introduced parental leave. About childcare facilities, there is a structural lack in the availability of educational services for early childhood compared to the potential needs. STEM researchers as a whole are relatively balanced (44% women), but differences can be observed in the specific disciplines. Very low are also the percentages of patent applications by women (11,63%) and of female founders in innovative start-ups (13.55%).

EVIDENCE ON UNILE GENDER EQUALITY POLICIES AND PRACTICES

UNILE applies the national regulations on gender equality which include criteria for human resources. It also adopts the Triennial plan of positive action (PAP 2020-2022) to tackle issues that minimise disparity. The winner applicants for job positions are gender-balanced. However, males are the majority who have academic contracts on Grade A, B and C. The University does not train the members of evaluation/selection committee in gender sensitive research evaluation/recruitment. Also, most females seem to drop out due to the difficulty of coping with their work-life balance. UNILE offers both to males and females a job with equal payment criteria that follow the national law. A great asset is that the institution has the Unique Guarantee Committee (CUG) that monitors gender equality all over the institution and writes an annual action plan called PAP (Positive Actions Plan). The institution has not established particular policies yet about the gender-neutral content of the communication material, but the CUG organises an annual training course on the non-



sexual oriented use of the language, with great resonance. The CUG is providing counselling for gender-based offences and harassment, and the Trusted Advisor is planned to be appointed to enhance its impact. In terms of intersectionality, it seems that the institution members are not fully aware of its meaning. UNILE does not apply any measures on the integration of gender into research content. As for the researchers, the share of females who lead a project is low across most departments, but the number of female scientists who are patenting research results in STEM is progressively becoming equal to males over the years. UNILE organises an annual presentation of study courses to high-school students to help them navigate them through the curriculum. The institution has not taken any activities towards gender sensitive teaching. The institution is active in transferring results to the market. However, there are no particular actions for female researchers to transfer their research results into the market.

CALIPER RECOMMENDATIONS FOR THE DESIGN AND DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a “GEP Working Group”**
 - **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management
- **Perform a qualitative and quantitative gender analysis.**
 - **Suggested areas for data collection:** Human resources, institutional governance, research, teaching, student services, transfer to the market, institutional communication, intersectionality, and sexual harassment.
 - **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate adopting and engage them in the GEP design and development process.
 - **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations
- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - Suggested methodology: develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis.
 - For UNILE the most realistic was the third scenario, which was the only one developed.
 - Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Possible solutions • Resistances (including strategies to overcome them) • Opportunities.
- **Organise Multi Stakeholder dialogues** involving the R&I Hubs assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders



[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the target set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of UNILE's GEP design and development process Human Resources: The subtopics are recruitment and selection, working conditions and work/life balance and career support and development strategies. In order to improve the related policies, the proposed measures include:

- Organisation of an analysis and evaluation study, to highlight any critical issues in the current selection and enhancement practices. Internal assessment of the analysis should follow, to update the selection processes.
- Elaboration and implementation of an “offer and request” online desk for the identification and support of work life balance measures, to map the needs of the staff, regardless of gender.
- The organisation of seminars for students and staff on prejudice and stereotypes, and interventions to promote the visibility of female scientific excellence. Mentoring by selected professors is recommended.
- Promotional material of role model interviews and women success stories in academia and business.

Institutional Governance: To address the low representation of women in high level positions and decision-making bodies, the measurements include:

- Annual review of Gender Budget by the respective body through gender budget dedicated meetings.
- Create a coordination group and build a dedicated team for the update and improvement of strategic actions in the GEP. Relevant contact persons can be identified.

Research teaching and third mission: In order to adopt gender sensitive policies in research, teaching, and market transfer proposed measures include:

- Support to transgender students through information campaigns, training of the students and training of the academic and administrative staff on gender sensitivity in order to avoid discrimination and biases.
- Interdisciplinary seminars on gender issues and feasibility study about the introduction of a gender course.
- Promotion and organisation of national and international workshops and conferences on gender topics.
- Training on implicit gender bias. The training methods and contents can be adapted to the audience (students, academic and administrative staff). Communication campaigns to advertise the initiative can complement.
- Participation in shared projects with institutions, panels, centres, professional associations dedicated to gender equality in academia and research.

Institutional Communication: There is a need for gender neutral language in the internal and external communication content. Proposed activities include:

- Creation of a web page in the institutional website, dedicated to gender related activities, and be updated with documents, regulations, news on initiatives and actions in progress related to gender policies.
- Organise a series of seminars on language and stereotypes in the media and social media, targeting both the internal academic community and local external stakeholders (professional bodies, institutions, etc.)
- Definition of the University Guidelines for the use of gender sensitive language through recognition and modification of existing practices (administrative forms, University website, regulations, other forms of communication).



- Staff training on the implementation of the Guidelines, and internal dissemination, through the communication channels.
- Implementation of the Guidelines in institutional documents, templates, the website and other forms of official communication.

Sexual and Gender Harassment: Measurements to improve the methods of combating sexual harassment include:

- Setting up a committee for detecting harassment cases, bullying and discrimination. The committee can have informative meetings and dedicated contact channels to communicate its role to the staff and the students.
- Drafting and approval of the Regulation on combating sexual harassment, bullying and discrimination in the workplace and in education.
- Publication of annual reports by the respective committee and subsequent preparation of a document analysing the situation and planning interventions.
- Dissemination of detailed rules on combating sexual harassment through a cycle of meetings dedicated to the topic of mobbing and sexual harassment (definitions, consequences, reporting processes, awareness raising).

Intersectionality: To strengthen the culture of intersectionality in the institution, proposed measures include:

- Implementing initiatives to raise awareness of the phenomenon of discrimination among students in relation to gender, age, disability, ethnic origin, language, political opinions, sexual orientation. Activities can be implemented in conjunction with cultural events and open days dedicated to students and their relatives.

CONCLUSION

The present policy briefing describes the European and Italian national context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, UNILE's GEP has been designed and described here for giving the example to other Research Performing Organisations operating in Italy for setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner UNILE using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

UNILE continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.2. Research Funding Organisations (RFOs)

3.2.2.1 Shota Rustaveli National Science Foundation of Georgia (SRNSFG)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European



Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation³⁴. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators³⁵. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration³⁶ adopted in 2021 highlights the importance of GEPs as a tool “to achieve long-term and sustainable advancement towards Gender equality in R&I”.

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach³⁷ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission’s (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for ‘inclusive’ Gender Equality Plans referring to “intersectoriality” as one of the dimensions along with intersectionality, and geographic inclusiveness.

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy brief highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at guiding national stakeholders in Georgia to effectively contribute to tailoring GEPs to specific domestic needs and developing quality assurance for GEPs. Although Georgia is a non-EU country, the institutions are willing to adopt gender equality policies to achieve institutional change. SRNSFG sets the example.

THE GEORGIAN CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Georgia has various laws and national policies in place that prevent discrimination in the workplace, including Higher Education Institutions. Until 2010, there were no laws specifically referring to gender equality. Adopted in 2010, the Law of Georgia on Gender Equality is one of the key legal acts regulating gender balance in higher education. It determines the state’s obligation to ensure equality of women and men in all spheres of public life, including education and science. Particularly, Article 7 of the Law of Georgia on Gender Equality addresses equality in access to higher education. Analyses of the national legislation and the policy

³⁴ [European research area \(ERA\) | European Commission \(europa.eu\)](#)

³⁵ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)

³⁶ <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

³⁷ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)



documents show that currently there are no national programs that integrate a gender dimension in scientific programs. Sexual harassment in the workplace is regulated by the [Organic Law of Georgia](#) of the labour code, complemented by the Gender Equality Law mentioned above. The Organic Law of Georgia, also regulates procedures of leaves, maternity leaves, leaves for the adoption of newborn children and compensation issues. In addition to this, it ensures gender equality in family relations. Finally, Georgia has established three national bodies to address gender inequality: 1) the [Gender Equality Council of the Parliament](#), 2) the [Inter-Agency Commission on Gender Equality, Violence against Women and Domestic Violence Issues](#), and 3) the [Gender Department of the Public Defender's Office](#).

EVIDENCE ON SRNSFG GENDER EQUALITY POLICIES AND PRACTICES

The external environment and the regulations in Georgia do not ensure gender equality within the institutions. The internal policies are insufficient if there are any. The lack of GE policies causes internal implications and sets barriers towards gender equality. There are no specific regulations on gender sensitive recruitment protocols, and there are no policies to support career progression for women. As a result, women are under-represented in top management positions and the gender pay gap is 15.88%. The institution doesn't provide sufficient parental leaves or flexible and part-time positions. Also, before COVID teleworking was not a regular practice. SRNSFG doesn't have an allocated budget for promoting gender equality, nor has established any gender equality bodies. However, there is an electronic system that gathers disaggregated data, providing the staff with a clearer view of the gender equality status in the institution. In regard to the communication material, the website has a relatively gender balanced content and the social media promotes women scientists. Although, there are no policies for gender equal internal communication material. In terms of research content the institution doesn't follow any specific regulations to ensure gender balance in the research teams and the evaluation processes, but they use a gender neutral and unbiased language. Last, SRNSFG doesn't implement specific policies against sexual harassment, nor provides training for the staff. There are no cases reported in the institution.

CALIPER RECOMMENDATIONS FOR THE DESIGN & DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a "GEP Working Group"**
 - **Suggested members of the GEP working group:** Staff members at different managerial levels including stakeholders from middle and high management
- **Perform a qualitative and quantitative gender analysis.**
 - **Suggested areas for data collection:** Human resources, institutional governance, research, transfer to the market, institutional communication, intersectionality, and sexual harassment.
 - **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate and engage them in the GEP design and development process.



- **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations
- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - Suggested methodology: Develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis. For SRNSFG the most realistic scenario was the third one, which was the only one developed.
 - Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Possible solutions • Resistances (including strategies to overcome them) • Opportunities.
 - For SRNSFG, the structure and use of the strategic change scenarios gave some direction to the Institution and helped in the mapping of the resistances. The most important resistances were detected in the organisational level regarding the structural change and the possible conflicts with the national legal framework. Through negotiations, the resistances can be overcome.
- **Organise Multi Stakeholder dialogues** involving the R&I Hubs and assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders.
 - Through the stakeholder dialogues with the R&I Hubs, the SRNSFG had the opportunity to broaden its network, and many stakeholders expressed their interest for further cooperation, including private and state Universities.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of SRNSFG's GEP design and development process Human Resources: To address gender equality include:

- Tailored training for the staff involved in the recruitment and selection process to raise awareness and change the attitudes and stereotypes against women.
- Exit questionnaire to detect the reasons employees drop out of their careers, adopting a gender perspective. The end goal is to create a more work/life balanced environment.
- Deliver training for the upskilling of the employees in all departments to facilitate their career progression and help them keep up with the fast pace of the development of technology.

Institutional Governance: To address the low representation of women in high level positions and decision-making bodies.

- Collect gender/sex disaggregated data at the organisational and institutional level, by adopting a methodology that will be regularly updated. This procedure can be monitored by the top management. Publish annual reports on gender equality can be helpful.

Institutional Communication: The popular perception of male dominance in the STEM community, creates the need for gender neutral language in the internal and external communication content. The proposed activities include:

- Establish a gender sensitive communication policy. A specialised strategy including training, conferences, workshops, symposia, etc. to raise awareness, inform and facilitate the demolition of stereotypes.



- Create a dedicated page on the institutional website to promote successful (Georgian) women in STEM and to encourage and inspire young women to follow STEM related career paths.
- Develop a strategic communication plan targeted to relevant internal and external stakeholders to further engage the local STEM community in a sustainable and effective way.

Research funding: If gender equality measures are not a funding requirement, proposed policies include:

- Set up a gender balance control mechanism to monitor the number of female researchers. Gender balance can be checked by creating a control field in the electronic system, where Principal Investigators will fill in the information about the number of female/male researchers involved in the project.
- Develop and deliver training sessions and relevant material to ensure successful bias free evaluation processes. After the end of the training, provide the evaluators and the committee members with a guide on gender sensitive evaluation processes.
- Establish an award for women scientists, to encourage young women to use role models and lead to positive change in attitudes towards women scientists.

Sexual Harassment: To address the issue of sexual harassment, proposed measures include:

- Adopt a formal policy to combat harassment and provide definitions and guidance regarding the behaviors that are considered as harassment. The policy may contain the foreseen consequences of abusing it, for creating a safe environment and promoting equal employment opportunities.
- Establish a mechanism of reporting such cases to encourage and support the victims and build trust, to eliminate sexual harassment in the workplace.

Intersectionality:

- Set up a reporting system to gather data on gender in conjunction with ethnicity, age, disabilities, etc.

CONCLUSION

The present policy briefing describes the European and Georgian national context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, SRNSFG's GEP has been designed and described here for giving the example to other Research Funding Organisations operating in Georgia for setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner SRNSFG using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

SRNSFG continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.

3.2.2.2 Executive Unit for Higher Education, Research, Development and Innovation Funding in Romania (UEFISCDI)

EU CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

Horizon Europe sets gender equality as a crosscutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems. In particular, European



Research Area Priority 4 focuses on gender equality and gender mainstreaming in research and innovation³⁸. The objective is to foster scientific excellence and breadth of research approaches by fully utilising gender diversity and equality.

Gender Equality Plans (GEPs) have been recognised as an effective gender mainstreaming tool for Research and Innovation (R&I) and Higher Education (HE) institutions to tackle the objectives of the European Research Area (ERA) via a set of actions implemented along with clear timelines and monitored through specific indicators³⁹. This is evident as well since a GEP is an eligibility criterion for acceding Horizon Europe funding for the R&I Institutions. Lastly, the Ljubljana Declaration⁴⁰ adopted in 2021 highlights the importance of GEPs as a tool “to achieve long-term and sustainable advancement towards Gender equality in R&I”.

Even though the institutional change strategy implemented through GEPs has had very positive impacts in many research organisations and has been a catalyser at national and EU level, there is still a need for a renewed approach⁴¹ which will enable Institutions to go beyond the minimum requirements for a GEP as defined in Horizon Europe eligibility criteria for effectively addressing the persisting structural barriers in R&I institutions.

For this reason, the recent ERA policies on gender equality in R&I have expanded their scope to cover innovation at large aiming at connecting academic research with society and the economy. This is evident from the European Commission’s (EC) most recent policy directions on Gender Equality in R&I and institutional change that seek for ‘inclusive’ Gender Equality Plans referring to “intersectoriality” as one of the dimensions along with intersectionality, and geographic inclusiveness.

The H2020 CALIPER project was designed and is now implemented, since 2020, addressing these three dimensions and in particular having intersectoriality as its key specific feature embedded in all steps of the institutional change process, from the internal assessment to the GEPs design and implementation phase, as well as in monitoring and evaluation.

Therefore, drawing upon the experience of the CALIPER project which aims at addressing gender inequality in STEM in 9 RPOs and RFOs across the EU and which has been built based on the GEAR tool but offering an additional inclusive approach, this policy brief highlights the main takeaways on the design & development, of an inclusive Gender Equality Plan. This particular policy briefing is the first version out of three policy briefings to be developed focusing on the inclusive GEP process.

Elaborating on the different dimensions of inclusiveness addressed by the CALIPER project, this policy brief aims at providing guidance to national stakeholders in Romania to effectively contribute on tailoring GEPs to specific domestic needs and developing quality assurance for GEPs.

THE ROMANIAN CONTEXT: EXISTING GENDER EQUALITY POLICIES AND PRACTICES

In Romania, principles of equal rights and non-discrimination are included in the Romanian Constitution. Indeed, in 2006, the CEDAW Committee pointed out that in Romania there is low representation of women in public life and decision-making and at the moment there is no functional mechanism at the national level to promote underrepresented gender in Higher Education and/or Scientific Research. Work-life balance is not a priority area for national policymakers, even if related measures and interventions are widely acknowledged as crucial for gender equality and women’s empowerment. Romania has provisions for various types of leaves (i.e. maternity, paternity and parental leaves), but a critical gap is the lack of adequate childcare services/facilities. The share of female researchers in STEM in 2015 (46.23%) was above the EU

³⁸ [European research area \(ERA\) | European Commission \(europa.eu\)](#)

³⁹ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)

⁴⁰ <https://data.consilium.europa.eu/doc/document/ST-12044-2021-INIT/en/pdf>

⁴¹ [wp-11-widening-participation-and-strengthening-the-european-research-area_horizon-2021-2022_en.pdf \(europa.eu\)](#)



average (33.4%), showing that gender division among researchers is rather equal in Romania, therefore no major policy developments in this respect were observed. Also, no national strategy for empowering women in entrepreneurship is in place at the moment.

EVIDENCE ON UEFISCDI GENDER EQUALITY POLICIES AND PRACTICES

There is a clear commitment to gender equality in UEFISCDI, while the participation of women in decision making bodies is encouraged. At the same time, there is no evaluation/monitoring process on gender equality in place as well as the existence of gender-sensitive budgeting. It is identified that there are no mentoring programmes at the institutional level. While the UEFISCDI is quite advanced in this specific area of institutional governance (66% women in middle management level, 80% women in top level leadership position). In relation to work-life balance, parental leaves have been taken mainly by females and currently, there is no data on part time/flexible hours arrangements, teleworking positions, career breaks and drop-outs by gender. With regards to the policies on equal pay, the salaries are legally established, and this does not take gender into consideration. Internal communication can be improved as there are no guidelines or protocols on gender sensitive language and non-biased communication. In the area of research funding, there is no provision about the integration of gender analysis into research or/and in funding programmes. No cases are reported to the UEFISCDI in regard to gender/sexual harassment. The institution lacks a specific mechanism to report and tackle the cases as it mainly relies on the Code of Ethics and its sanctioning measures. Finally, about the intersectional approach, there is a strong need of having incremental and active learning on gender issues to change people's perception of the role of women and men.

Furthermore, in order to advance the work carried out on the gender equality dimension with CALIPER, both within the organisation and outside its boundaries, towards the whole R&I national ecosystem, UEFISCDI is participating in other connected actions that aim at providing support mechanisms for the GEP implementation. Moreover, these actions foresee capacity building activities both for other RFOs and policy makers.

CALIPER RECOMMENDATIONS FOR THE DESIGN AND DEVELOPMENT OF AN INCLUSIVE GEP

[A] Setting up the scene for the GEP design and development: Perform an analysis of external and internal conditions for the GEP development and acceptance. Identify potential gender biases and inequalities along with scenarios towards change using the proposed actions below:

- **Set up a “GEP Working Group”**
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 - **Tools:** set up intersectional indicators and targets to be achieved and collect sex-disaggregated data via desk research and interviews
- **Set up Research & Innovation (R&I) Hub:** Adopting the quadruple helix approach gather information through desk research, network analysis and interviews with key stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations and identify the regional/national innovation ecosystems in which they operate adopting and engage them in the GEP design and development process.
 - **Suggested members of the R&I Hub:** Stakeholders from academia and universities, industry, ministries/government, public sector, civil society organisations



- **Develop strategic change scenarios to** better understand and reflect key factors, the potential measures and the strategic collaborations with internal and external stakeholders that need to be leveraged with regards to the implementation of the GEP
 - Suggested methodology: Develop three scenarios focusing on the identification of the maximum resistances, the maximum opportunities, and a mix of both in the areas mentioned in the gender analysis. For UEFISCDI the most realistic was the third scenario, which was the only one developed.
 - Suggested main components of the scenarios: • Situation • Main problems • Objective(s) • Possible solutions • Resistances (including strategies to overcome them) • Opportunities.
- **Organise multi-stakeholder dialogues** involving the R&I Hubs and assess the above-mentioned scenarios and investigate opportunities and barriers for collaboration with the regional and national stakeholders.

[B] GEP design and development: Develop an inclusive GEP based on the knowledge and experience gained and the targets set.

Recommended areas to focus when designing and developing a GEP in Croatia, on the basis of UEFISCDI's

GEP design and development process Human Resources (HR): In this focus area, the subsections include recruitment and selection, working conditions and work/life balance, and career progression. Proposed measures include:

- Developing an informative kit with instructions on gender discrimination and stereotypes identification in recruiting processes. Steps to structure the kit: 1. Internal research for best practices regarding recruitment gender sensitive protocols, 2. Developing a first draft, 3. Gathering feedback from stakeholders, 4. Finalising the kit, 5. Organising training for the recruitment experts and HR department, 6. Informing the staff about the updates on the recruitment protocols, 7. Annually evaluate its impact on the recruitment processes.
- Organising “Back to work” training after the parental leaves. Training the middle managers on how to implement this measure and support the returning employees is necessary, as well as raising awareness among other colleagues about the importance of the transition period.
- Organising “Soft skills” training. The process to structure the training includes: Research for best practices and similar training regarding soft skills and time management for the employees returning to work, Developing and organizing a training and an informative kit on the topic, evaluate the result of the training.
- Increasing the number of employees fit for leadership positions by evaluating leadership qualities and competencies and developing a “shadowing” program (each participant is partnered with a top management representative and shadows his/her routine for a specific period of time). The development of a personalised coaching & mentoring program for the selected participants is also recommended.
- Organising an internal educational program to help employees acknowledge their latent potential, and to provide the middle managers, information about other abilities and interests of their employees. The programme can start with the evaluation of the skills and competencies, both by the employees and the middle management, to develop a career plan for participants. Evaluation of the program is also necessary.

Sexual and moral harassment: Measurements to improve the methods of combating sexual harassment include:

- Developing an Informative kit regarding sexual and moral harassment to raise awareness, help identify the harassments' types and clearly explain its concept (definition, limits etc). The structure



process can be seen as follows: Internal research for best practices regarding the kit; Developing the kit; Organising training on the topic and presenting the document; Evaluate the employees' acknowledgement regarding the topic.

Institutional Governance: To address the low representation of women in high level positions and decision-making bodies, the measurements include:

- The establishment of a Gender Equality Body. The top management should discuss in order to identify the needed employees and external advisors, list the candidates and interview them. After the selection, the development of the necessary procedures in order to supervise and implement the GEP can follow.

Institutional Communication: The popular perception of male dominance in the STEM community, creates the need for gender neutral language in the internal and external communication content. The proposed activities include:

- Developing an informative gender sensitive communication kit to assure that both internal and external institutional communication are gender sensitive. Training can be organised and an evaluation process.

Research funding: For a more gender equal research funding process the actions below are recommended:

- Analysis of women participation in research projects to understand why women participate less and how the research content is affected, as well as to identify how women researchers can be encouraged to join research areas dominated mainly by men. First, the institution should identify the pool of projects to be analysed, conduct the analysis, draw the conclusion, and finally propose recommendations.
- Training for research evaluators regarding the gender dimension to assure that they are able to recognise the gender components and do not misinterpret them because of ideological beliefs. An informative kit can be elaborated on how gender dimension should be taken into consideration when evaluating research projects.

Transfer to the market: In this area, proposed actions include:

- Implementing quotas/targets when inviting speakers at the events, having a better representation of women and addressing gender sensitive topics. The institution can elaborate guidelines on the topic and establish quotas for each event (depending on the subject). Also, an extended list of women (correlated with different topics) that can be invited to the events can be helpful.

CONCLUSION

The present policy briefing describes the European and Romanian national context as well as the institutional context regarding gender equality policies and practices as they have been depicted in the extensive external and internal analysis conducted within the context of the CALIPER project. Based on the abovementioned context, UEFISCDI's GEP has been designed and described here for giving the example to similar organisations operating in Romania, aiming to inspire the overall R&I ecosystem in setting up their inclusive GEP.

This policy briefing is the first out of the three to be developed by the CALIPER partner - UEFISCDI, using the knowledge and experience gained from its participation in the CALIPER project and more specifically on setting up (focus areas of the 1st policy briefings), implementing (focus area of the second 2nd policy briefing) and monitoring and evaluating its inclusive GEP (focus area of 3rd policy briefing).

UEFISCDI continues with the implementation of the abovementioned suggested actions included in its GEP. After the completion of the implementation phase, the second policy briefing will be developed and published including the knowledge gained.



4. Conclusion and next steps

The deliverable was the first out of the three the CALIPER project will develop and provides recommendations on the design and development of an inclusive GEP, drawing upon the knowledge generated during the first phase of the project related to internal & external assessment and the GEPs design. It contains suggestions both in terms of methodology, as well as practical advice on which concrete actions to include in order to develop an inclusive GEP. The deliverable presented the steps that were followed to structure the recommendations, explaining the content that was put in each section. Then, the actual recommendations were presented.

As already mentioned, this deliverable is the first out of the three that CALIPER will develop. The second deliverable will contain more concrete information based on the CALIPER experience from the implementation phase and will take into account evidence and results of the first implementation phase as will emerge from the formative evaluation. It will be submitted by the end of September 2022. The third and last version will take into account the results of the whole monitoring and evaluation phase, and it will be submitted by the end of December 2023.

Lastly, the policy briefing should catch the eye of the potential audience in order to create a favourable impression (e.g. professional, innovative etc). After the approval of each version of the briefings from the European Commission, the content of the briefings will be transferred to appealing templates for their dissemination. The policy briefings may be potentially translated into each RPO/RFOs national language, to increase the engagement of the national target audience.



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