



CALIPER

Gender Equality in STEM Research

HOW TO SUCCESSFULLY DESIGN AND DEVELOP AN INCLUSIVE GEP

*Addressing Intersectionality, Intersectorality and
Geographic Inclusiveness*

Policy Briefing v1 for EU-level Stakeholders
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“EXECUTIVE SUMMARY

The adoption of a Gender Equality Plan (GEP) aims at removing the systemic obstacles to gender equality and 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, intersectoriality, and geographic inclusiveness)** mentioned in the recent **European policies on gender equality, referring to “inclusive GEPs” aimed at going beyond the minimum requirements for a Gender Equality Plan (GEP) as defined in Horizon Europe eligibility criteria[1].** In addition, aimed at supporting 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 each one and provides inputs on how to design and develop an inclusive GEP, according to the above-mentioned dimensions.

It calls for 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&I[2]. 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 alongside clear timelines and monitored through specific indicators[3].

The Ljubljana Declaration[4] (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 catalyst at both national and EU level, with 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 expected to cover, the European Commission is also calling for a renewed approach that

promotes the design and adoption of inclusive Gender Equality Plans[5]. 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 "intersectorality" 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, since 2020, implemented) to address these three dimensions. In particular, having intersectorality as its key specific feature has been 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 CALIPER's experience so far, contributing to this renewed approach in a practical manner.

CALIPER RECOMMENDATIONS FOR THE DESIGN AND DEVELOPMENT OF AN INCLUSIVE GEP

This section elaborates further **on the dimensions of intersectionality, intersectorality and geographic inclusiveness, based on the CALIPER Project'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, and different abilities. This can -and should be- applied to external assessment of the conditions, such as the legal and cultural framework and the local/national innovation ecosystems that influence the state of gender equality in the wider context of which an Institution is placed.

Evidence from the 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 internal and external institutional actors to enable the contextualisation of potential gender bias by investigating practices as well as organisational and innovation processes.

Changing data collection methods and practices in this direction is often considered in contrast with privacy protection and data minimisation principles, particularly in smaller organisations 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 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 and results) for RPO/RFOs and there can be spaces to increase the number of women researchers in STEM and participate towards joint efforts in taking the gender dimension of research into consideration.

How: Set up a 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 sector, ministries, government and public sector, civil society organisations and identify the regional and national innovation ecosystems in which the organisation operates.

Evidence from the 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 has 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, each of 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, selected and motivated external actors which leads 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, whilst 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 means for achieving cultural and geographical tailoring of the measures.

Suggested members of the R&I Hubs: 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 organisations 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 approach**[3].

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 the 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 Turkey). Some of these institutions come from countries such as Spain and Belgium, 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 have been created and new channels of communication 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 document aims at elaborating further based on CALIPER's knowledge experience so far of the core dimensions for setting up an inclusive GEP, as they have been depicted at the recent EU policies.

“ REFERENCES

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Learn more about CALIPER project and the Gender Equality Plans:



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