

It's all About Priorities: Tips for Successfully Implementing Gender Equality Actions

Maria Sangiuliano¹, Kyriaki Karydou² and Danai Kyrkou²

¹Smart Venice SRL, Italy

²ViLabs OE, Thessaloniki, Greece

maria.sangiuliano@smartvenice.org

kyriaki-karydou@vilabs.eu

danaikyrkou@vilabs.eu

Abstract: The adoption of an inclusive Gender Equality Plan (iGEP) in Research Performing Organisations (RPO) and Research Funding Organisations (RFO) is a dynamic process that mobilises knowledge and skills, and at the same time creates challenges in each step. The Horizon 2020 CALIPER project supports seven RPOs and two RFOs across Europe in implementing iGEPs, focusing on the STEM fields. At this stage, CALIPER partners completed the first iteration phase of their iGEP implementation lasting 12 months. This work-in-progress paper presents practical examples from their GEP experience so far, focusing on the activities/steps an institution can put in place to adopt an inclusive approach to the GEP process. The “tips” are grounded in the formative evaluation reports, drafted by the CALIPER RPOs/RFOs after the end of the first implementation iteration. This action-oriented paper targets practitioners, active in Gender Equality (GE) in Research and Innovation (R&I).

Keywords: Gender equality, STEM, Research, Innovation, iGEP

1. Introduction

Since 2015, the EU actively promotes and supports, the implementation of GEPs in research organisations as a tool for structural change (Clavero & Galligan, 2021). The adoption of a GEP may contribute to removing obstacles to GE (Ljubljana Declaration, 2021) and changing knowledge production by integrating a gender+ perspective into the entire research cycle. However, GE is a long-term process and thus GEPs often face steep challenges that may result in a throwback to former practices and behaviour (EIGE, n.d). In this context, what kind of approaches can support a successful iGEP implementation? This work-in-progress paper is focused on exploring this question via the analysis of nine GEPs implemented within the frame of the Horizon 2020 CALIPER project in the first 12-month iteration period. It provides practice-based guidance in the form of “empirical tips” as recommendations.

The CALIPER project adopted an innovative approach for setting up/implementing the GEPs in its participating RPOs/RFO* aligning with the ERA “inclusive” GEP dimensions: intersectional, intersectoral, and geographic inclusiveness (European Commission, 2021), adding an “internal” dimension (internal engagement via participatory approaches).

After an outline of the CALIPER methodological approach, the paper proceeds with the recommendations. The main limitation is that it is an in-progress work, presenting interim results based on desk research of the formative evaluation reports provided by the CALIPER partners from the partial implementation of the GEPs. Although the formative evaluation methodology was sound and thorough and implemented by using a variety of research tools (surveys, semi-structured interviews, focus groups), the overall assessment of the outcomes and impacts is not finalised yet.

2. CALIPER iGEP Methodology

The CALIPER methodology relied on the baseline approach from the GEAR tool (EIGE, 2022), and the five interlinked phases including analysis of the state of play analysis of inequalities, GEP design, implementation, monitoring and evaluation, and sustainability. The four inclusiveness dimensions have been embedded in each one of the above-mentioned methodological phases.

Geographic inclusiveness is sought in view of overcoming the significant gap among countries in the level of adoption and execution of GE measures (ERAC SWG, 2021). European policies on Gender in R&I take such gaps into account and address heterogeneity, facilitating knowledge circulation between “advanced” and less advanced countries.

CALIPER has adopted a geographically inclusive approach from its conception phase engaging with organisations from nine countries across Europe spanning from Southern, Central, Eastern, and Western Europe, Georgia, and Turkey, all on different levels of GE uptake.

Intersectionality addresses gender inequalities along with other structural inequalities and discrimination grounds, such as social class, race/migration/religious background, etc. While analytically powerful for overcoming a binary definition of gender (Verloo, 2006), it is considered challenging to translate intersectionality into policies (Showunmi, 2020).

The CALIPER internal assessment methodology (Sangiuliano & Cescon, 2020) has fostered a cross-cutting intersectional approach to data collection to feed into the iGEP design phase: improvements in internal data collection methods and tools became specific measures within the partners' iGEP. An intersectional approach has been followed in the implementation of specific actions (engaging girls with migrant background in STEM events) and/or has led to dedicated iGEP measures (promoting so-called 'alias careers' for Transgender students in a transition process).

iGEPs can only achieve limited outcomes if universities, RPOs, RFOs, government bodies, professional associations, civil society, and the industry operate in silos (EC, 2019). Existing networks between each implementing partner and the external innovation ecosystem have been analysed from a gender perspective (Sangiuliano, Cescon & Nason, 2021). Dedicated indicators designed to identify GE gaps in R&I ecosystems and synergies have been established with external stakeholders activating CALIPER R&I Hubs at each participating institution adopting a multistakeholder/quadruple helix approach to promote active collaboration in the implementation of some of the GEPs measures.

Internal inclusiveness responds to the need for engaging internal stakeholders through participatory methods in change management and when pursuing institutional change for GE (Dahmen-Adkins, Karner & Tahler, 2019). iGEP design has been conducted in parallel with the creation of the CALIPER internal GEP working groups involving personnel from all levels of the hierarchy. A co-creation methodology was adopted for engaging internal and external actors in the iGEP process.

The CALIPER Monitoring and Evaluation methodology was designed and throughout the process revised to include indicators to track and classify the inclusive dimensions of each GEP measure. Sustainability is going to be achieved by leveraging intersectoral and internal inclusiveness and seeking external stakeholders as potential partners and co-funders of continued iGEPs.

3. CALIPER Preliminary Findings and Recommendations

The preliminary empirical findings and recommendations presented below are based on desk research of the Formative Evaluation Reports of the first 12 months iteration phase conducted by each partner and summarised in D.4.2 v.1 (Cescon & Sangiuliano, 2022).

3.1 Geographic Inclusiveness

Some CALIPER organisations were more advanced and already had in place some GE provisions backed by corresponding national legislation, while the majority were "beginners". Knowledge transfer from more advanced to less advanced institutions is often suggested in the adoption of GE measures, and the CALIPER project itself has built on the knowledge generated by multiple research institutions involved in previous similar EU-funded projects, besides having its own internal knowledge transfer mechanisms among partners. However, it is important to acknowledge that the transfer of actions from one institution to another is beneficial when customised and adapted to the national legislative context.

4. Intersectional Inclusiveness

In CALIPER many efforts were made to introduce the concept of intersectionality and to point out how adopting a binary approach to GE creates barriers for minorities. In this vein, a CALIPER RPO revised its annual staff and students' surveys to gather intersectional disaggregated data allowing us to understand better existing intersectional inequalities. Collaboration with relevant NGOs proved to be insightful, supporting the institution for the optimal use and demonstration of these data.

The topic of intersectionality can potentially cause internal and external resistance also fostered by regressive discourses that reflect the spread of anti-gender ideologies (Kuhar and Paternotte, 2017). CALIPER partners are experiencing how these dynamics are also affecting academic/research environments. In such contexts,

introducing measures that target women with different gender identities/sexual orientations/ethnicities can provoke resistance and calls to go back to a “binary-business-as-usual”. Ad-hoc strategic considerations can lead to identifying the right “windows of opportunities” to gradually promote an intersectional approach to GE. CALIPER partners often found themselves negotiating on including one or few inequalities other than gender to expand their intersectional approach, without jeopardising the implementation of the GEP measures. When resistance was stronger, the trade-off was either going for a binary gender approach or no action at all.

4.1 Intersectoral Inclusiveness

CALIPER has strived to position RPOs and RFOs as reference points for GE in their ecosystems by setting up awareness-raising actions organised in collaboration with external stakeholders. A successful example was the establishment of an annual award for women working in the field of information technologies to disseminate their research work, acknowledge their efforts, and provide them with networking opportunities; another was the organisation of “innovation cafès” that have made RFOs visible towards external stakeholders as promoters of GE creating ties with the local innovation ecosystem.

Engaging key external stakeholders in the GEP processes through the R&I Hubs has led to considering gender balance and gender sensitiveness in transfer to market of scientific research results, and in actions to motivate young girls to embrace STEM studies. These broad collaborations are proving to facilitate institutional change internally, but also to initiate a conversation among the regional and national stakeholders, to adopt and implement gender policies in their organisations.

In CALIPER, Women in INnovation (WIN) events have been organised by all partners, to highlight women-led innovations, and gender-sensitive product development/design, while raising awareness to attract more girls to STEM research. The nine WIN events took different forms, attracting and being co-organised with a variety of stakeholders from academia, industry, CSOs, public bodies, and schools. WIN events aspire to be a sustained iGEP action.

4.2 Internal Inclusiveness

Internal inclusiveness is crucial for the success and longevity of GE actions (LERU, 2018) which require the active involvement and commitment of the top management to be successful. In CALIPER, top management representatives were part of the change process from the design and development phase of the iGEPs; the partners have created dedicated GEP working groups whose members come from the top and middle managerial levels and are responsible for the development, implementation, monitoring and eventually sustainability of the GEP actions.

Also, adopting a bottom-up approach proved to be highly effective. Setting up co-creation processes using participatory techniques from the design phase to engage internal stakeholders was found to be a useful approach (Aguirre, Licata & Menotte, 2020). In case of resistance from the top management, the mobilisation from middle management and administrative/academic staff is functioning as a ‘pressure point’ on the top management. In this vein, the CALIPER partners have included in their action plan a series of internal raising awareness sessions to support the GEP Working Groups and increase engagement throughout the different steps of the structural change process.

*CALIPER partners can be found here: [Gender Equality Actions – Caliper Project \(caliper-project.eu\)](https://caliper-project.eu)

(All documents accessed October 2022. CALIPER deliverables accessible at Zenodo)

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