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## **DELIVERABLE 2.1**

# **Report on good practices and comparative mapping of inequalities**

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## 1. Introduction

### 1.1. NEXUS: project description, aims and objectives

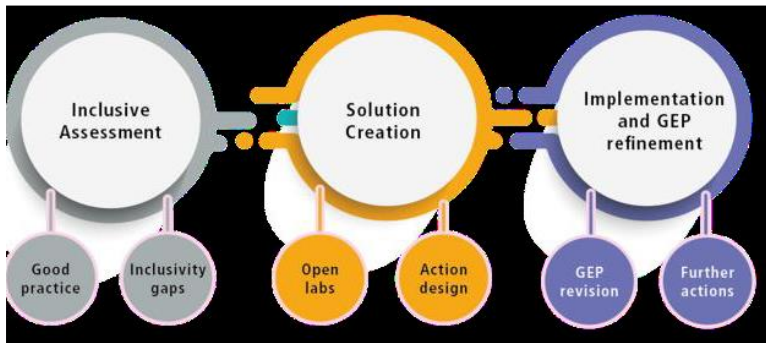
The NEXUS project co-designs, implements, monitors and evaluates innovative and targeted actions aimed at bridging inclusivity gaps in nine research organizations and their respective R&I ecosystems with the aim to foster institutional change through the development of inclusive Gender Equality Plans (GEPs) in intersectional and intersectoral directions. Geographical inclusiveness is also promoted through a highly context-sensitive approach to action piloting in seven Member States and in Associating Countries, covering Western, Central, Southern and Southeastern regions. The project sets up structures in less experienced institutions to go beyond the minimum GEP requirements, as defined in the Horizon Europe eligibility criterion, through a participatory, multi-stakeholder process of solution co-creation sustained by a twinning scheme and the delivery of tailored capacity building and training programmes. NEXUS analyses how implementing partners with newly set up GEPs perform data collection, internal assessment and the planning of GEP measures with a view to identifying areas of improvement as well as potential challenges in enhancing an inclusive approach. This analysis informs the co-design and implementation of new innovative inclusive actions, underpinned by the principles of intersectionality and intersectorality. NEXUS actions will enhance the research excellence of participating organisations as well as effecting institutional and cultural change that is context-sensitive, realistic and sustainable.

Gender equality has become a key policy priority for universities and research organisations across Europe. Structurally, these institutions continue to be male dominated (European Commission, 2021) and, regarding persisting inequalities, university leaders have been tasked with defining action strategies to reduce and eliminate structural gender bias in their organisations. Since 2015, GEPs have been recommended and supported by the EU in this context (Rosa and Clavero, 2022). However, GEPs have been criticised for not sufficiently considering the intersectional nature of inequalities, the intersectoral approach to achieving gender equality, and for not accounting for the benefits of a geographical inclusive approach across multiple European regions.

In this context, NEXUS aims to foster institutional change through the design and implementation of innovative inclusive actions leading the advancement of GEPs in 9 Research Performing Organizations (RPOs), with intersectional and intersectoral approaches put into practice.

Concerning inclusivity, NEXUS has five specific objectives defined through dedicated work packages. The project comprises of three distinct phases: (1) inclusiveness assessment; (2) solution creation and (3) implementation and GEP refinement (see fig. 1 for details).

Figure 1: NEXUS Phases



This deliverable is focused on activities conducted as part of Phase 1 (WP2), which aimed at identifying and assessing inclusivity gaps in the GEPs of each of the 9 implementing partner organisations using methodology and guidelines developed as part of this work package (see **section 1.3** for

details).

Figure 2: NEXUS Work Package 2 Specific Objectives

- Identify proven innovative practices (intersectional and intersectoral) both within and outside the NEXUS consortium
- Develop a methodology with a common framework for the integration of an inclusive perspective in GEPs internal assessment and mapping of inequalities in NEXUS implementing institutions
- Analyse inclusivity gaps with a special attention to the way in which implementing institutions perform their data collection and monitoring
- Identify areas of improvement and potential challenges in enhancing and inclusive approach to the following domains: work-life balance and organizational culture, recruitment and career progression, decision making and leadership processes and structures, research and teaching content as well as the measures against gender-based violence (GBV), including sexual harassment.

## 1.2. Relationship with other tasks and work packages

Overall, this document provides conceptual and methodological groundings for the NEXUS approach to intersectionality. Promising practices presented in section 3 will be utilised to identify actions in the five recommended GEP action areas. On the other hand, the analysis of partners' existing GEPs will be used to identify areas of improvement and potential challenges in further enhancing an inclusive approach. This overview will also inform the identification of complementary and potential synergies among partners also in terms of discrimination grounds and collaborations with the R&I ecosystems, for the development of a twinning trio scheme to be applied in the next phases of the project. Indeed, each institution will twin with two other partners to create three parallel inter-institutional working groups ("NEXUS twin groups"). The "NEXUS twin groups" will be balanced and combine partners with more advanced GEPs with partners

having less advanced GEPs. Each “NEXUS twin group” will focus on at least two of the 5 recommended GEP action areas.

### 1.3. Methodology

The analysis presented in this deliverable is based on activities conducted as part of WP2 tasks, which were focused on identifying and analysing inequalities in each implementing partner institution. First, all partners submitted a brief description of inequalities present in their organisation. Second, 10 ‘promising practices’ were identified by using the latest EIGE GEAR Toolkit, relevant web repositories and publications from projects on gender equality in R&I. This task was conducted in three phases. In the first phase, each implementing partner selected at least 4 promising practices in their own (or neighbouring) country and filled in a grid designed by the WP leader. These grids were distributed among the partners prior to the practices selection process and explained in detail. These promising practices were initially analysed against the following criteria: intersectionality and intersectorality dimensions, relevant GEP action areas, as well as the level of embeddedness, relevance, effectiveness, innovativeness, and transferability of the practices. Following this, the WP leader, in discussions with the relevant partner, agreed on one practice to be analysed in more detail. The WP leader selected two practices from their own institution for detailed analysis. Next, a literature review was conducted to inform the next stage, which included an in-depth, systematic analysis of the public documents of the practice, together with an online, semi-structured interview with the practice holder. This process was followed by all partners in a coherent matter with all the guidelines, as well as analysis grids, prepared by the WP leader in advance. All interviews were conducted in the native language of the partner and the data collected was inputted in English in the grids, which focused on various aspects of the promising practice. A separate set of guidelines was provided for the document analysis and the overall assessment. The 10 practices were then analysed by the WP leader. These are presented in section 3, along with the review of the relevant international literature, which also includes good practices from outside of the consortium.

The third activity of the work package analysed data collection practices used for the purpose of developing GEPs. This consisted of three interrelated tasks and began with each implementing partner conducting their own analysis of the internal data collection practice. For these purposes, the work package leader designed a coherent methodological tool with detailed guidelines provided to the consortium. The analysis was based on the following: document analysis (data collection for the GEP), semi-structured interviews with three staff members who were involved in the collection and analysis of institutional data necessary for the development of GEP, and a focus group with five staff members who were involved either in the data collection process or the design of the GEP. Data gathered from the interviews, focus groups and document analysis was inputted in dedicated grids with detailed questions designed to assess different aspects of data collection practices (4 separate grids). In addition, a dedicated grid was provided for the overall assessment. Particular attention was paid to the following criteria: intersectionality, domains addressed, and intersectorality (stakeholders involved). The filled-in grids were then shared with the WP leader and subsequently analysed. The comparative analysis of data collection practices is presented in section 4.1. This activity was conducted along with the comparative analysis of existing GEPs, which were pre-analysed by each implementing partner. This is

presented in section 4.2 Finally, a methodology for inclusive data collection was designed in cooperation with KU and was based on the data collection practices conducted by the partners and the existing relevant literature. This methodological guideline is presented in section 4.3.

### 1.4. Structure of the document

This deliverable is structured as follows. The details of the nine implementing partners are introduced in section 2, followed by a summary analysis of inequalities encountered at the time the development of partners’ current GEPs. The conceptualisation of intersectionality and inclusive GEPs in the RPO context is explored in section 3. Section 4 presents the results of the analysis of the nine promising practices selected by the partners and includes a contextual background which presents some international examples of promising actions related to inclusivity. Section 5 focuses on the existing GEPs introduced in the implementing organisations, examines their practices of data collection, followed by an analysis of the GEPs currently in place. Based on this, section 6 presents a methodology for inclusive data collection, developed as part of this work package. This methodology was set up to guide partners in building more inclusive GEPs within their institutions, and to support other organisations within the RPO sector who wish to enhance their action plan by improving their data collection practices. Finally, section 7 provides a brief conclusion to this document.

## 2. Implementing Partners: Description of Organisations and Inequalities Identified

GEPs are not developed in a vacuum and should carefully consider existing inequalities, as well as the possible factors contributing to the persistence of such inequalities. To gain a better understanding of possible synergies and complementarity between implementing partners, all participating organisations completed self-evaluation forms on the general characteristics of the institutions, and the inequalities addressed. While the focus was primarily on gender, partners also had an opportunity to list other inequalities and to describe their institutional approach to intersectionality. These are explored in this section.

### 2.1. Participating Organisations

The project partners are located in seven Member States (MS) and two Associated Countries (AS), covering Western (Ireland and France), Central (Hungary and Poland), Southern (Italy) and Southeastern (Bulgaria, Cyprus, Serbia and Turkey) regions. Seven of the participating organisations are universities while two are research institutions, all with a strong STEM orientation. Details of the participating organisations are as follows:

*Table 2.1: Implementing Partners*

Implementing partner	Description
<b>Technological University of</b>	The largest university in Ireland, and Ireland’s first Technological University, TU Dublin was formed from three legacy institutions in 2019. TU Dublin offers a range programmes and disciplines, with pathways to graduation from foundation and apprenticeship to



<b>Dublin (TU Dublin)</b>	undergraduate and doctoral levels. A leader in STEM disciplines, TU Dublin also supports the largest cohorts of students of business, media, culinary arts, and the creative and performing arts in Ireland.
<b>The AGH University of Science and Technology (AGH)</b>	A public university in Krakow, Poland AGH carries out scientific research in the fields of technical sciences, natural sciences, earth sciences and social sciences, with the current priorities of the economy and the business world being at the fore this research. There have been numerous investments made at the AGH UST over the past decade, which have led to the development of research areas in the university.
<b>Frederick University (FredU)</b>	A private university with two campuses (Nicosia and Limassol) in the Republic of Cyprus FU is one of the leading research organizations in the country and has a strong focus on academic research. The university also, offers a broad range of academic programmes of study in diverse areas such as, Science, Engineering, Business, Arts, Architecture, Media, Humanities, Health, and Education. The research initiatives and activities that are being carried out in the University have led to FU being amongst the most successful organisations in Cyprus regarding the level of funding received for projects from external sources through competitive national and European programs.
<b>Koç University (KU)</b>	Located in, Istanbul, Turkey KU is an endowed, non-profit institution of higher education. KU was one of the two universities in Turkey to be in the top 500 in The Times Higher Education World University Rankings in 2021. The Center for Gender Studies at Koç University (KOÇ-KAM) was established in 2010 as an interdisciplinary hub for gender research and gender studies. It carries out a competitive funding programme to support outstanding academic research projects on gender issues.
<b>Fondazione Istituto Italiano di Tecnologia (IIT)</b>	A non profit research organisation located in Genova, Italy, IIT aims to promote excellence in both basic and applied research and to facilitate the economic development at national level. It was established in 2003 and today has vast experience in managing and promoting research projects. The scientific vision of IIT is interdisciplinary, based on the concept of “translating evolution into technology,” that is mimicking natural solutions to develop innovative technologies in the fields of robotics, computer science, materials science, and life science.
<b>Bay Zoltán Nonprofit Ltd. for Applied Research (BZN)</b>	A non-profit, private research organisation in Budapest, Hungary BZN is the largest institute of applied research in Hungary. Its mission is the development of sustainable competitive advantage for Hungarian companies through innovation and technology transfer. BZN has been the national coordinator of the Hungarian EURAXESS networks since 2012, providing advice and training for member institutions of EURAXESS Hungary. They also provide advice and services for research institutions in Hungary on European policy issues including the institutional environment for research and HR strategy.
<b>Sofia University (SU)</b>	A public university in Sofia, Bulgaria SU is the first Bulgarian Higher Education establishment. SU is the leader in Bulgaria in relation to both student and lecturer mobility accross Europe. A member of EURAXESS, SU coordinate the network nationally and they initiated the wide implementation of the HRS4R process in Bulgaria. Since 2019 SU holds a HR ‘Excellence in Research’ award. In 2021 SU adopted its first GEP.
<b>Faculty of Mechanical Engineering in</b>	NU operates in the framework of the University of Nis as a separate legal entity, as the University in Nis is not an integrated University. Founded in 1960, as the only faculty of mechanical engineering in the south-east of Serbia the Faculty of Mechanical

<b>the University of Nis (NU)</b>	Engineering in Nis continues to fulfill its mission in education, scientific research, and participation in the development and transformation of society. Currently, there are 1414 students at all levels of studies at the Faculty. Academic activities are conducted by a total of 104 professors and assistants.
<b>The University of Le Mans (UM)</b>	UM, a French multidisciplinary university attracting 12 000 students to two campuses on Le Mans and Laval, with 15 laboratories, has nearly 400 researchers, 300 PhD students or post-doctoral fellows and approximately 100 engineers, technicians or administrative personnel. UM hosts more than 1200 international students per year. Out of the 15 laboratories, 7 are in STEM fields (Physics, Chemistry, Biology/Physiology, Geology, Mathematics and Informatics), representing almost 500 persons

All these organisations have a GEP in place. However, they are at different stages of advancement, development, and implementation. The project activities are thus integrated into the context in which partners have already activated financial and human resources for the development of their GEPs, albeit at various levels and with various levels of institutional engagement.

Participating organisations can also be characterised by the different ways in which structural inequalities are experienced, depending on factors such as the cultural understanding of inclusivity, national legislation and the nature of their structures and practices. These inequalities will be further explained in the following section. While paying continuous attention to intersectoral and geographical aspects of inclusivity, this deliverable mainly focuses on the intersectional dimension of inclusive GEPs developed in the participating institutions.

## 2.2. Inequalities identified by implementing partners

### 2.2.1. Horizontal and vertical gender segregation

Drawing on most recent data publicly available, most partners identified significant horizontal and vertical gender segregation within their institutions. In most cases, these related to women being overrepresented in administration and support grades, and underrepresented in academic positions, particularly in STEM. Vertical segregation is also persistent, with men outnumbering women at top management positions across academic and professional support grades. In terms of horizontal segregation, **AGH** reported that women account for 65% of administrative and 30% of academic positions. A similar situation was present in the **IIT**, where 42% of the overall staff are female, with 60% of administrative staff and 35% of technical and scientific staff composed of women. In **BZN**, 44% of all staff are women but they represented only 33% of research staff. Furthermore, in this institution, women's representation ranged

#### HORIZONTAL AND VERTICAL INEQUALITIES:

- Women more likely to be employed in administration and support while men constituted a higher share among STEM faculty members
- Women underrepresented in higher grades (admin and academic)

from 65% (in the Financial Management Directorate) to 20% (in the Engineering Division). The Situation in **TU Dublin** also fits with the overall trend. Women constitute 46% of all full-time equivalent (FTE) staff, yet the proportion of women among professional, management and support services is slightly higher (51%) while among academic staff they accounted for only 30%. The male-female ratio is also unbalanced in **UM** where women constitute 69% of administration and technical grade staff, 42% among the category of “teaching researchers” and only 24% of full professors. In **FredU**, there are visible differences between faculties, as, for example, the vast majority of staff in the Engineering School are men, while the opposite situation could be observed in the School of Education. The underrepresentation of women in the Engineering and Science was also noted by **KU**, while **NU** also emphasised the existence of limited opportunities for either men or women depending on the discipline or specific services where some occupations were perceived as “exclusively men’s or exclusively women’s work”.

Such imbalance was also present in most of the partners’ institutions in relation to vertical segregation. **AGH** noted the existence of a “glass ceiling” for women within administrative structures due to invisible barriers to promotion. A “leaky pipeline” is also an issue, with a decrease in the proportion of women along the lines of academic career progress. There is also a significant numerical predominance of men at different levels of power, and, in most decision-making bodies, the proportion of men exceed 70%. In **FredU**, gender gaps are significant in relation to professors/associate professors’ grades and other academic ranks, as women tend to be situated at the lower levels. In **IIT**, vertical segregation is also evident within their organisation as less women are recruited to top positions, in comparison to men. In **KU**, women held relatively advantageous positions between 2017 and 2020, with higher shares of women in managerial roles compared to men. However, this has been reversed since 2021 when the share of men became higher. In **BZN**, for 2 out of 9 members of the management, 6 out of 19 heads of department, and 1 out of 13 team leaders are women. In **TU Dublin**, although the Governing Body and Academic Council are gender equal since 2020, women comprise just 33% (4 of 12) of the University Executive Team. Of the 5 Faculty Dean positions, one is held by a woman, though there is better gender balance at academic middle management: among the 25 Heads of School, 10 (40%) are women. In **UM** the president is a male, supported by a governing body of one female deputy president and five male deputy presidents/executive directors. At lower levels, the male/female ration is also unbalanced as men direct 11 out of 15 laboratories.

### 2.2.2. Other existing equality, diversity and inclusion issues present in the institution (by domain)

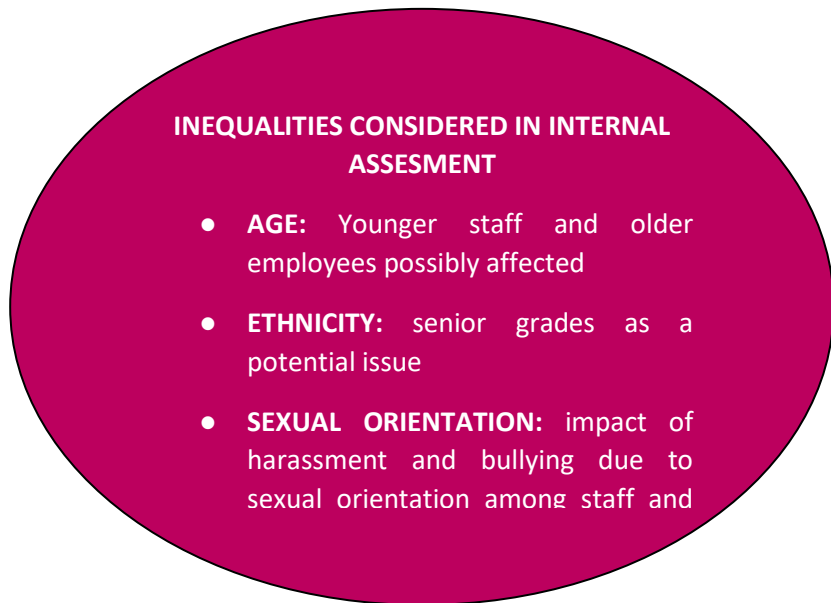
Several partners reported on other EDI issues related to different GEP action areas. In relation to **work-life balance and organisational culture** this was noted as an issue by **AGH** and by **FredU**. In relation to **recruitment and career progression**, **TU Dublin** noted that women on permanent academic contracts are more likely than men to be employed on a part-time basis (women 12%: men 9% in 2022). Although there are the same number of female and male academics working as hourly-paid staff, considered as precarious (187 women, 187 men), proportionally women are in the majority in this employment group. Within the professional and support category, women are more likely to have temporary contracts (66 women, 47 men in 2022). **FredU** also identified career progression and recruitment strategies as one of the issues that need to be addressed within their

institution. Finally, in relation to **Gender Based Violence**, **AGH** noted the need for this type of measures because women within their organisation are more likely to experience behaviours with signs of harassment.

### 2.2.3. Intersectionality considered by participating organisations

In most of the partner organisations, intersectionality is not considered in a systematic manner. **AGH** reported other inequalities of treatment in relation to sexual orientation or age. This is particularly the case for young people (mainly women) in relationships of dependence, subordination and power, who experience unequal treatment, including harassment and sexual harassment. **IIT** reported that, when career paths are considered, women tend to be underrepresented in the older age groups (over 50 years old).

This organisation is also highly aware of their internal diversity in terms of language, culture, race and religion. **BZN** noted that while their institution is characterised by low numbers of international staff, they do not actively promote the hiring staff from underrepresented groups or from abroad. While BZN has adopted a non-discrimination charter (which outlines intersectionality dimensions, such as gender,



**INEQUALITIES CONSIDERED IN INTERNAL ASSESMENT**

- **AGE:** Younger staff and older employees possibly affected
- **ETHNICITY:** senior grades as a potential issue
- **SEXUAL ORIENTATION:** impact of harassment and bullying due to sexual orientation among staff and

race, ethnicity, health and disability) for compliance with national legislation, they do not have a policy to reduce gender gaps or to actively counteract discrimination. **KU** reported an internal need to address different aspects of intersectionality, including the intersection between gender and age (e.g., difficulties faced by younger academics) as well as discrimination related to sexual orientation. **TU Dublin** noted that they have gaps in their intersectional data collection processes (not in relation to disability data). However, from 2021 all newly hired staff have an option to voluntarily complete their personal profile covering the ten legislative equality grounds. The university is also characterised by the prevalence of white Irish staff at senior grades. Yet, the University Strategic Intent has a KPI in this regard, aiming at 20% of staff with an international background. **NU**'s internal assessment concluded that "intersectionality is somehow disguised by the faculty" while ethnic background or nationality are not mentioned due to the overall non-multi-ethnic profile of the university. Faculties provide opportunities for students coming from vulnerable groups (e.g., Roma and other nationalities, persons with disabilities). However, despite these efforts, the numbers have remained low. On the other hand, the issue of sexual orientation has not been actively and widely discussed within the organisation. Finally, **SU** noted that the university has been following the national rules regarding persons with disability, and discrimination, although no specific measures have been adopted at the organisational level.

## 2.3. Further Implications

Based on the data presented above, most of the partners can be characterised by a strong STEM orientation, which has implications for gender inequality, and possibly for other inequalities. It was evident from the self-evaluation that most of these organisations share similar inequalities in both horizontal and vertical directions. With a few exceptions, women tend to be over-represented among administration and support staff and underrepresented in academic positions in STEM faculties. Vertical segregation also features in most institutions, with men usually constituting a higher share of those in managerial grades. Quite importantly, intersectional inequalities were frequently not taken to account. This is a significant gap when taking inclusivity into consideration. As will be demonstrated in section 4, this gap needs to be addressed not only in the GEP actions themselves, but also in relation to data collection practices, which are currently not sufficiently intersectional.

## 3. Intersectionality in Institutional Change Processes in Higher Education and Research Organisations

### 3.1. Intersectionality: Concept and history

The concept of intersectionality originates in Black feminist thought. Kimberlé Crenshaw, an American feminist legal scholar, coined this term in the late 1980's to reflect the complexity of the experience of workplace discrimination of black women. Crenshaw showed that this experience could not be adequately captured by using a 'single-axis' discrimination legal framework based on race or sex alone as this rendered invisible the experiences of those who were at the 'intersection' of race and gender. Racism and sexism factor into Black women's lives in ways that can only be captured by looking at the race and gender dimensions of those experiences together (Crenshaw, 1989). Crenshaw used the metaphor of intersecting roads to depict intersecting roads of oppression.

*"Discrimination, like traffic through an intersection, may flow in one direction, and it may flow in another. If an accident happens in an intersection, it can be caused by cars traveling from any number of directions and, sometimes, from all of them. Similarly, if a Black woman is harmed because she is in the intersection, her injury could result from sex discrimination or race discrimination". (Crenshaw, 1989, p. 149)*

Furthermore, Crenshaw argued that the invisibility of black women's experiences is not only due to the single-axis nature of discrimination law, but to the deeper problem that the groups upon which the law is based tend to focus on the more privileged amongst them. While Black male and white female narratives of discrimination are viewed as fully inclusive and universal, Black female narratives are rendered partial and unrecognisable by standard race and sex discrimination law:

*“The paradigm of sex discrimination tends to be based on the experiences of white women; the model of race discrimination tends to be based on the experiences of the most privileged blacks. Notions of what constitutes race and sex discrimination are, as a result, narrowly tailored to embrace only a small set of circumstances, none of which include discrimination against black women.” (Crenshaw, 1989, p.151)*

Since the publication of Crenshaw’s seminal work, the concept of intersectionality has travelled across multiple disciplines, national contexts, institutions and organisational practices. The concept has also been extended beyond gender and race to include other social groups/categories/discrimination grounds, such as age, ability, sexual orientation and religion. Intersectionality is a concept that is continually evolving. It is a contested concept which has been interpreted as a theory, a research paradigm, a methodology, an analytical tool, a ‘lens’ or a sensibility. There is also lack of agreement about the subject of intersectionality ( the ‘things’ that are ‘intersecting’), i.e., whether these are ‘categories’, ‘identities’, ‘social groups’, ‘social relations’, ‘grounds’ or ‘strands’ (Walby et al., 2012, p. 229).

Yet, despite the multiple understandings and uses of the concept of intersectionality, a majority of theorists concur with the view that intersectionality is inextricably linked to an analysis of **power, privilege and oppression**. A good general definition to start with is the following:

*“Intersectionality promotes an understanding of human beings as shaped by the interaction of different social locations (e.g., ‘race’/ethnicity, Indigeneity, gender, class, sexuality, geography, age, disability/ability, migration status, religion). These interactions occur within a context of connected systems and structures of power (e.g., laws, policies, state governments and other political and economic unions, religious institutions, media). Through such processes, interdependent forms of privilege and oppression shaped by colonialism, imperialism, racism, homophobia, ableism and patriarchy are created” (Havinsky, 2014, p. 2).*

An analysis of **intersecting relations of power** is at the core of intersectionality approaches. From an intersectional perspective, power is relational, which implies that a person can simultaneously experience both power and oppression in varying contexts and at varying times (Collins, 1990). For example, intersectionality theory does not posit that Black lesbians will in every context be more disadvantaged than, for example, Black heterosexual men. Because power relations are contextually constituted, social categories created by those systems and structures of power are fluid, rather than stable.

An intersectional approach in politics and policy aims to transform the power relations that are taken for granted among the **privileged**, as well as the structures that create those power

differentials. If intersectionality is to be a truly transformative project, researchers and practitioners must consider their own social position, role and power. This kind of ‘**reflexivity**’ involves critical self-awareness, role-awareness, interrogation of power and privilege, and the questioning of assumptions and ‘truths’ in their work before setting priorities and directions in research and policy (Scully et al., 2017).

### 3.2. Intersectionality, multiple discrimination, and diversity approaches

These key aspects set intersectionality apart from other approaches such as “multiple discrimination” and “diversity management”.

- *Intersectionality and multiple discrimination:* Multiple or compound discrimination approaches focus on the individual, positing that the greater the number of marginal categories to which one belongs, the greater the extent of disadvantage that one will experience. The focus on disadvantaged people of multiple discrimination approaches obscures the role of the privilege within sets of unequal social relations, which intersectionality approaches brings to the fore. An intersectional approach, therefore, does not consist in extending recognition and representation to the multiply-marginalised “other”, asking them to represent “difference” and incorporating their standpoint in ways that leave us and the standpoint of our privileges invisible and yet determinative (See Yuval Davis, 2006; Ferree, 2015).
- *Intersectionality and diversity management:* Diversity management practices aim at increasing the number of individuals belonging to historically marginalised social groups in organisations. While in theory the concept of diversity encompasses a whole range of differences beyond those associated with disadvantage or covered by anti-discrimination legislation, in practice, it is differences associated with discrimination that tend to form the focus of diversity management practices. From an intersectionality perspective, the main critique of diversity management approaches is that they do not challenge existing power relations, as questions of unequal power and social justice goals tend to be sidelined or removed from the agenda altogether, in favour of utility arguments that address diversity as a business case. While diversity management initiatives abound, intersectionality has not been fully utilised to explore structures of discrimination and systems of power and inequality (see Rodriguez et al., 2016; Hearn & Louvrier, 2016; Denissen et al., 2018) despite the recognition of the workplace as a critical site for the (re)production of intersectional inequalities (Acker, 2006, 2012).

### 3.3. Intersectionality in EU policy

The importance of addressing intersectionality has become a common message in the EU and in national policy debates, yet practical application of the concept in legislative processes, policy-making and practice remains limited (Advisory Committee on Equal Opportunities for Women and Men, 2020, p. 3).

Until 2000, EU anti-discrimination law was limited to ‘sex’ discrimination, and discrimination on the grounds of nationality for EU nationals (European Commission 2016, p. 62). The Treaty of Amsterdam extended discrimination to other grounds to include racial and ethnic origin, religion and belief, disability, age and sexual orientation, opening up new possibilities for the recognition of multiple discrimination. On the other hand, Article 21 of the Charter of Fundamental Rights prohibits any discrimination based on any ground, including religion or belief, disability, age or sexual orientation, amongst others.

Following on these developments, two directives were added to the set of sex and gender discrimination laws to cover this mandate: one concerning equal treatment irrespective of racial or ethnic origin (Racial Equality Directive 2000/43/EC); and the other concerning religion or belief, disability, age or sexual orientation in the workplace (Employment Equality Framework Directive 2000/78/EC). In 2008, the Commission adopted a proposal for a directive concerning discrimination based on age, disability, sexual orientation and religion or belief beyond the workplace (COM (2008) 426 final). Although the European Parliament approved the Commission’s proposal in 2009, subject to 80 amendments to the original text, to date this proposal has not been given European Council approval.

EU anti-discrimination law presents severe structural obstacles to the application of the concept of intersectionality in legislative processes and policy-making, because different grounds are found in different pieces of legislation and also because the various directives have differing scopes – the areas covered by the racial directive being the most comprehensive in this regard.

Despite these obstacles, narratives about the importance of intersectional approaches are slowly gaining ground in EU policy and debates. Defined by the European Institute for Gender Equality (EIGE) as an “*analytical tool for studying, understanding and responding to the ways in which sex and gender intersect with other personal characteristics/identities, and how these intersections contribute to unique experiences of discrimination*” (EIGE Glossary and Thesaurus <https://eige.europa.eu/thesaurus/terms/1263>), the concept is very present in the Commission’s Gender Equality Strategy 2020-2025 where intersectionality is a horizontal principle for its implementation.

This represents an important step forward, as earlier EU policies failed to consider intersecting inequalities. For example, an intersectional perspective was lacking in the List of Actions by the European Commission to advance LGBTI Equality 2016–2019. While the List refers to Article 21 of the Charter of Fundamental Rights – covering discrimination on grounds of sexual orientation and gender identity – it does not acknowledge the possibility of multiple or intersectional discrimination for LGBTI persons based on other factors, such as class or ethnicity (EIGE 2020, p. 10).

### 3.4. Relevance for Institutional Change

There is a large body of theoretical and empirical research looking into the institutional embeddedness of gender in the processes, practices, images, ideologies, and distributions of power in organisations (Acker, 1992); the processes of gender institutional change (Mackay et al., 2010) and the role of context (including both formal and informal rules) in constraining and facilitating actions (Waylen, 2014); as well as the role of resistances in cases of policy



implementation failure (Mergaert & Lombardo, 2014). This body of research tends to focus on gender, yet it represents a solid foundation for intersectionality thinking and practice in institutional change processes.

The importance of adopting intersectional approaches in transformative projects of institutional change is increasingly being recognised. Intersectional approaches enable a more nuanced understanding of institutionalised power dynamics in organisations, and more effective policy responses to inequalities than “one-size fits all” unitary gender approaches. In the words of Acker:

*“Racial definitions, exclusions and inclusions, are created in the same organizing processes that also create and recreate gender inclusions and exclusions, resulting in a much more complicated picture of differences and inequities. For example, hiring practices might be based on assumptions about racial identities as well as gender identities. Interactions at work may be shaped by racial stereotyping as well as gender and class stereotyping” (Acker, 2012, p. 219).*

While the feminist literature on gendered organisations and institutional change brings to the fore the importance of gender-power structures, their exclusive focus on gender can render invisible those inequalities that result from intersecting relations of power between gender and ethnicity/race, sexual orientation, age, ability, class, religion etc. In addition, the lack of attention to privilege in current gender policy practice, and its tendency to focus on discriminated/disadvantaged groups (i.e, women) has had the implication that men have excluded themselves from analyses of power and have remained disengaged from equality initiatives aimed at achieving institutional change towards gender equality (Tomlinson, 2018). This is a limitation that intersectional approaches aim to overcome.

Putting intersectionality theory into policy practice is, however, far from straightforward. The lack of a clear definition of the concept, the challenges of its operationalisation and the absence of a concrete methodology renders its application in policy very difficult (Havinsky & Cromier 2011, p. 220). Adopting an intersectional approach to gender equality in organisations requires that the concept is translated into concrete interventions aimed at challenging and disrupting the dynamics of power and inequality, in a language that management can recognise, understand and use. Often, these difficulties in moving from theory to practice result in the adoption of multiple discrimination, rather than intersectional, approaches (Verloo et al., 2012, p. 527).

A intersectional approach to gender institutional change must identify which inequalities to address. For these purposes, it is important to determine “which differences make a difference”. **Context** is fundamental in the implementation of intersectional institutional change strategies, as there are no *a priori* prescriptions. That is, each organisation must define its strategy taking into account the internal and external elements conditioning its situation and its possibilities of making changes (for the importance of taking context into account).

Identifying relevant intersecting inequalities in a given context requires that the concept of intersectionality is understood in terms **power rather than identity**, as analyses of power can

reveal those inequalities that carry significance (Tomlinson & Schwabenland, 2010). Moving away from a categorical view when putting intersectionality into practice can thus help prevent the risk of overlooking intersecting inequalities that are important to address in a concrete institutional setting. Nonetheless, categorical understandings of gender, race, etc. may be necessary up to a point, as they allow for the collection and analysis of quantitative data (Acker, 1992, p. 556).

**Intersectional perspectives in baseline assessments** can generate more complete information to better understand the origins, root causes and characteristics of inequality in the organisation. These baseline assessments “may include a data analysis that integrates other dimensions apart from gender, such as age, race and ethnicity, disability, sexual orientation and religion” (EIGE, 2016, p. 20). Lack of systematic knowledge on the situation of social groups’ standings at intersections of axes of power – particularly in the form of statistical evidence –represents a problem when moving from theory to practice (EIGE, 2020, p. 11). The unavailability of statistical data (sometimes connected to data protection issues) can severely limit the scope of the analysis of intersecting inequalities. Once variables are disaggregated by gender, they can be then analysed one intersection at a time (e.g. gender and age; gender and race, and so on). This may enable identification of the groups of women and men who are the least/most disadvantaged and the areas where more targeted policy measures are needed, as well as highlighting the factors that place certain groups at an advantage. (EIGE, 2019, p. 13).

One way of filling in the information gap provided by quantitative data is to collect and analyse people’s experiences through qualitative research, such as staff surveys and other qualitative methods such as semi-structured interviews and focus groups.<sup>1</sup>

**Training** is also a key activity for intersectional work as it helps to improve staff’s knowledge of intersectionality and systems of oppression, contributing to raising awareness and questioning constructs, and providing tools to construct a critical perspective that helps to rethink everyday practices. Training needs can be identified when collecting qualitative data through interviews for the baseline assessment. Once these needs have been identified, training programmes may include not only specific training on intersectionality but also the incorporation of an intersectional perspective into training in a more cross-cutting way, regardless of the subject being addressed.<sup>2</sup>

**Participatory methods** are also key to effective institutional change strategies at their design, implementation and evaluation stages (for a definition of a participatory approach to GEP implementation see EIGE, 2016, p. 21). In putting intersectionality into practice, creative participatory processes that include iterative dialogue and reflection enable the identification of exclusionary attitudes and discourses which undermine people’s agency as well as the factors that facilitate or hinder the involvement of different groups in participation spaces. Overall,

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<sup>1</sup> For qualitative data collection and analysis, see this primer on intersectionality informed qualitative research (<https://www.ifsee.ulaval.ca/sites/ifsee.ulaval.ca/files/b95277db179219c5ee8080a99b0b91276941.pdf> ). The Iglyo intersectionality toolkit also provides some tools for evaluating the status quo in an organisation, and for thinking about the steps to take in order to ensure an intersectional approach (<https://www.iglyo.com/wp-content/uploads/2015/09/Inter-Toolkit.pdf>

<sup>2</sup> The igualtats-conectades toolkit to incorporate intersectionality into local policies includes a list of recommendations for training for intersectional work (<http://igualtatsconnect.cat/wp-content/uploads/2019/06/Publicacion-Igualtats-Connect-ENG-1.pdf>)

institutionalised participatory processes appear to increase “the possibility that policy documents include a more explicit, articulated, transformative, inclusive and less biased approach to intersectionality” (Lombardo & Rolandsen 2011, p. 490. See also Alonso & Arnaut, 2017).

### 3.5. Pitfalls, obstacles, resistances

There are different types of pitfalls, obstacles and resistances that may hamper the application of an intersectional approach.

Some of them are related to **the very conceptualization of intersectionality**. As the intersectionality concept is often interpreted in different ways (Dhamoon, 2011) there is uncertainty about what intersectional categories should be included in any given investigation (Hankivsky & Cormier, 2011; Hankivsky et al., 2014). A common pitfall is the use of strategies which are merely additive, as they start with considerations of gender, as the primary identity source (Nichols & Stahl, 2019), to which others are added (e.g., gender + age + race), with the consequence of reinforcing and essentialising precisely the rigid and stereotypical categories that intersectionality intends to fight (Hankivsky et al., 2014; Yuval-Davis, 2006; Hankivsky & Mussell, 2018). This happens by attributing fixed categories through a top-down approach, while the picture should be built ‘upwards,’ starting from how women and men actually experience oppression (Symington, 2004).

Many challenges are also related to **the different aims that can be pursued** by those adopting an intersectional perspective, and to their unintended consequences. Sometimes, intersectionality is used as a way to include specific groups into a “supposed” and unfortunately still largely unquestioned mainstream (Ferree, 2015), or in a way that it reinforces existing stigmas (for example, considering lesbian women in relation to issues such as marriage, partnership, and assisted reproduction, but not in relation to issues like violence or unemployment) (Verloo, 2015). Another risk is using intersectionality as overlapping with diversity, which is a concept adopted to favour an increase in economic productivity and not to promote social justice (Squires, 2007). Still – and particularly within ‘additive’ approaches – intersectionality risks creating a ‘hierarchy of oppression’ in which different equality groups fight over scarce resources and institutional access (Squires, 2007).

**The application of a quantitative approach to intersectionality** may also meet obstacles. Among them are:

- The lack of official disaggregated data to assess the comparative situation of a specific discriminated group (European Network Against Racism, 2018) and, more generally, the lack of data organised in a way that facilitates intersectional analyses (Christoffersen, 2017)
- The tendency to analyse the different social categories separately, at the cost of examining the intersection of the independent variables involved (Hankivsky & Cormier, 2011)
- The paucity of statistical methods that can explore complex intersections (Hankivsky & Cormier, 2011)

- The tendency to use the dominant group in a given culture, generally white males, as the reference group against which every other category is compared, yielding results that are limited or distorted (Hankivsky & Cormier, 2011)
- The risk of paradoxically reinforcing fixed oppressive classifications, often underlying the production of statistical data, because of the need to collect data highlighting the effects of the social dynamics of inequality (Squires, 2007).

There are also **active resistances** to intersectionality, often raised by those:

- Who are not open to social justice-oriented change and not interested to discover power and structural asymmetries in the context of politics and policy making (Hankivsky et al., 2014)
- Who have an *a priori* set of priorities in mind, such as gender or indigenous sovereignty, and do not accept to leave the determination of what is important to the process of discovery (Hankivsky et al., 2014)
- Who fear that the recognition of other equality strands could limit the focus on, or could run counter to, the gender dimension (for example, that the recognition of ethnic minority and religious group rights may limit and erode the pursuit of gender equality) (Squires, 2007).

In terms of **policy-making and institutional change**, it can be difficult to translate the complex knowledge produced through intersectionality into accessible condensed messages for policy actors to digest and understand (Hankivsky et al., 2014), as well as to embed intersectionality in organisational cultures (Coll-Planas & Solà-Morales, 2019), and to connect the outputs of intersectional analysis to action and structural change (Hankivsky et al., 2014).

Intersectionality is often disregarded in institutional change efforts (Hunt et al., 2012) on the grounds that it is impossible to apply it or that it is a complication that is not worth pursuing (Coll-Planas & Solà-Morales, 2019). The tendency to apply it in a simplified way, at a purely technical or administrative level is also pointed out (Symington, 2004; Coll-Planas & Solà-Morales, 2019).

Finally, obstacles can be found in the way **legal frameworks** are set up. At the EU and UN level (but usually at the national level too) separate policies and legal mechanisms are established for the different grounds of inequality, with the consequence that the different equality policies are managed in isolation from one another, so that cases “falling through the cracks” are not considered (Symington, 2004; Kantola, 2009). Moreover, at the European level, the legislation is very rigid, since it provides lists of grounds of discrimination impeding to add grounds by analogy (Kantola, 2009; Fredman, 2016).

### 3.6. Concluding remarks

As discussed in this section, intersectionality has gained an increased among scholars, and has become a strong component of policies within the RPO context. The discussion presented above clearly demonstrates the need to scrutinise multiple inequalities and to adopt a gender+ approach to develop a more in-depth understanding of the needs of different groups. Nevertheless, obstacles and challenges remain at the structural, cultural and institutional levels, and these need to be recognised, and, if possible, channelled into a positive outcome.

The following sections will focus on intersectionality in RPOs. We will first turn into the analysis of existing promising practices to provide a snapshot of what can be achieved through inclusive actions. Second, implementing partners GEPs and data collection practices will also be analysed from the point of view of adapting an intersectional perspective. Finally, the last part of this report will provide some insights and recommendations for more inclusive data collection practices in the RPO context.

## **4. Promising practices: review and analysis**

### **4.1. Promising practices for inclusiveness: literature review and international examples**

#### **4.1.1. Introduction**

This review explores good practices in relation to Inclusive Gender Equality Plans. The concept of inclusivity underpinning NEXUS is three-dimensional, and includes intersectional, intersectoral and geographical aspects. As outlined earlier, intersectional inclusivity is an approach to institutional change that moves beyond an exclusive focus on sex and gender, as it understands gender to be mediated by other social identities and attributes (such as race, ethnicity, religion, class, age, sexual orientation, and disability) which overlap and interact in complex systems of privilege and disadvantage. The second dimension of inclusivity is intersectoral inclusivity, which recognises the relationship between sectors and/or parts of R&I ecosystems to act to tackle inequalities. Intersectoral inclusivity is important; without it, actions regarding inequalities will most likely result in limited outcomes, particularly if different sectors (universities and other RPOs, RFOs, public authorities, non-governmental organisations, professional associations, private companies and the publishing sector) operate in silos. Thirdly, geographical inclusivity is grounded in the nuanced regional, national, and local disparities that exist in the European Research Area.

Promoting an inclusive approach to R&I which actively engages with intersectionality and intersectorality beyond the level of discourse is integral to tackling discrimination and the patterns accompanying it (European Commission, 2022, p. 35). This section provides an overview of the concept of Inclusive Gender Equality Plans as defined in the literature and how these should be implemented, monitored and evaluated. This is followed by a selection of particularly promising initiatives at the institutional level which show how inclusive actions have been successfully implemented.

#### **4.1.2. Inclusive Gender Equality Plans**

The European Commission includes a commitment to inclusivity by opening policy to intersections with other social categories, such as ethnicity, disability (including accessibility and inclusion) and sexual orientation. In line with this, the Commission proposes to develop inclusive gender equality plans with Member States and stakeholders (ERAC, 2020).

Inclusive Gender Equality Plans are comprised of policies and actions that go beyond the minimum requirements for a Gender Equality Plan as defined in Horizon Europe eligibility criteria and

include three core dimensions, namely, intersectionality, intersectorality, and geographic inclusiveness (CALIPER, 2023, p. 2). They are based on an aspirational ideal that “refers to the need to address intersections of gender with other social categories, such as ethnicity, race, class, disability, and sexual orientation in the quest for organizations that ensure equal visibility, power, and participation for all” (Chaves & Benschop, 2023, p. 5).

National and local institutional and cultural contexts are important and influence the successful implementation of Inclusive Gender Equality Plans (Chaves & Benschop, 2023, p. 319). Key elements necessary for successful implementation include:

- Active commitment by the organisation/institution to inclusive gender equality which includes the support of both “organisational strategies and change agents [that are] working towards institutional change” (Strid et al., 2023, p. 9).
- Active inclusion and supporting of individuals from underrepresented and historically excluded groups (European Commission, 2022, p. 33).
- Internal change agents need to be identified and provided with sufficient and appropriate resources and capacity building to be supported (Strid et al., 2023, p.9).
- Dominant ideologies/norms of exclusion and heterosexism have to be actively deinstitutionalised and “viable alternative[s], to enable structures, processes, and norms to address LGBT, diversity and inclusion” need to be established (Strid et al., 2023, p. 9).
- For change to be meaningful, the design and implementation of actions need to actively involve specific groups at risk of bias or discrimination (European Commission, 2022, p. 33).
- Inclusive actions have to be implemented according to the timeline and responsibilities decided upon (Strid et al., 2023, p. 19).
- There needs to be a network of stakeholders who support the implementation of the Plan (Strid et al., 2023).
- Inclusivity needs to be visible, and the related activities, progress and difficulties have to be transparently communicated to the entire community within the organisation (Strid et al., 2023).
- Data needs to be collected in a comprehensive manner and the data collection process to be underpinned by an intersectional framework. The data collected needs to be able to assess the progress of the Plan (European Commission, 2022, p. 33).
- Steering groups that have sufficient expertise and experience to guide action plans that embed multiple perspectives have to be established (European Commission, 2022, p. 36).
- Sufficient budgets, human resources, leadership commitment, and equality units, officers, and networks at both the national and organisational levels need to be in place (Winsnes Rødland et al., 2015).

### 4.1.3. Good Practices from Europe and Beyond

#### *Inclusive recruitment, selection and promotion practices*

Higher Education and Research Institutions aiming to be more inclusive should also embed inclusive practices in their recruitment process, ensuring that it does not disproportionately affect historically under-represented groups such as minority ethnic, female, LGBTQ+, or disabled applicants.

**The Erasmus University of Rotterdam** has developed a toolkit on inclusive recruitment and selection. [PowerPoint Presentation \(eur.nl\)](#). This toolkit distinguishes four steps in the recruitment and selection process (1) preparing for the recruitment and selection process, 2) inclusive recruitment, 3) standardising the preselection process, 4) evaluating and reporting). Different tips and examples are offered per step, which can be used by every vacancy holder and selection committee member within the organization, regardless of the department or the organizational unit and the type of position in the vacancy. The toolkit also contains appendices on inclusive language as well as templates for the pre-selection and interview forms .

#### *Inclusive access for students*

Making higher education systems inclusive and providing the right conditions for students of different backgrounds to succeed. Strategies to help disadvantaged and underrepresented students access so that they go on to complete higher education are a promising way of achieving these objectives.

**RMIT University** in Melbourne (<https://www.rmit.edu.au/about/our-values/diversity-and-inclusion/programs>) has a particular focus on improving access to individuals from diverse backgrounds including students from: Indigenous communities; low socio-economic backgrounds; regional or remote communities, refugee backgrounds and students with disability; women and gender diverse students in programs in which they are under-represented, and students who have experienced socio-educational disadvantage. These good practices include 'I Belong' which is a programme that address barriers to higher education, careers and professions among regional, low socioeconomic status (SES) and Indigenous secondary school students. The programme aims to inspire and build tertiary engagement with secondary school students by offering an innovative approach to discipline exploration through applied workshops, presentations from industry experts and peer-delivered modules.

#### *Inclusive leadership and decision-making practices*

Research suggests that all employees thrive when their leaders strive to create inclusive workplace cultures. However, leaders' implicit or unconscious biases can sometimes negatively influence their attitudes and behaviours, leading to discriminatory practices and undermining the organisation's Equality, Diversity and Inclusion goals.

The **Inclusive Leadership Programme at University of Cambridge (UK)** [PPD Personal and Professional Development - course description: "Inclusive Leadership Programme" \(cam.ac.uk\)](#) is designed to support leaders and managers across the University (in academic, research and

professional service posts) with the skills and insights they need to lead others effectively. It enables participants to reflect on their current leadership style and provide techniques they can use to effectively manage a diverse range of perspectives and create an inclusive culture across the University. The programme is targeted at university leaders and managers in academic, research and professional service (non-academic) roles, including Group Leaders and PIs/senior researchers with responsibility for others. Deeply embedded in the university strategic priorities, the programme is one of several university initiatives to close the known gaps (including progression and pay inequality) for women, BAME and other groups of staff.

#### *Inclusive organisational culture and work-life balance*

An inclusive culture in higher-education and research institutions fosters the existence of a democratic community through common inclusive values and principles that are shared by all employees and all students, and that guide the decisions concerning the organisation's policy and daily practices. An inclusive culture creates an organisational environment that allows people with multiple identities and backgrounds, experiences, life circumstances and ways of thinking, to work effectively together and to perform to their highest potential.

Inclusive approaches to work-life balance are key in the development of an inclusive organisational culture. In this regard, **the University of New South Wales (UNSW)** has developed Flexible Work Guidelines and Flexible Work Toolkit after extensive consultation across the university. These resources ensure staff can access information about flexible work at the university. The Flexible Work guidelines and Toolkit offer succinct information about flexible work arrangements and demonstrate UNSW's commitment to supporting workplace equity, diversity and inclusion.

The toolkit is a practical guide for employees and managers to navigate flexible work at UNSW. It offers an introduction to flexible work at UNSW including examples of the types of flexible work available, support for employees and managers and case studies of UNSW staff who work flexibly. The toolkit aims to be the foundation of all flexible work discussions as flexible work transitions into a 'business as usual' activity across the University.

#### *Integrating an Inclusive dimension into research and teaching content and practice*

Integrating intersectional perspectives within the R&I sphere can substantially impact on research excellence as it can negate the impact intersectional biases may have which can lead to "bad science" (Gendered Innovations 2 report European Commission, 2020b). The COVID-19 pandemic increased awareness of the need to integrate intersectional perspectives in research, with research undertaken during the pandemic showing that to focusing on only one axis of inequality at a time impedes a full understanding of how the pandemic effected different social groups in society (Maestriperi, 2021).

The **Policy Framework for Sex, Gender and Diversity Analysis in Research** ([A framework for sex, gender, and diversity analysis in research | Science](#)) is a five-part analytical framework for implementing and evaluating policies on inclusive research design. The framework was used to evaluate the quality of SG&DA policies for 22 major national funding agencies across six continents. By collecting emerging global practices for policy implementation, the framework



seeks to improve understanding of these policies and practices in efforts to enhance international collaborations and research excellence. The study develops an analytical framework to evaluate the uptake of policies for integrating sex, gender, and diversity—which covers intersectional characteristics such as age or life course, indigeneity, race and ethnicity, sexuality, socioeconomic status, and other axes of inequality—into research design. This framework:

- Can help research funders plan, implement and evaluate their own policies and practices.
- Can improve research quality and support global collaboration.
- Highlights the need for improvements in policy evaluation.

On the other hand, an intersectional approach to curriculum design and to teaching practices represents a key mechanism through which increasing inclusivity in Higher Education institutions can be realised. Intersectional approaches can be linked to recent efforts to decolonise curricula, where knowledge and practice that has been historically and institutionally submerged is reordered and reclaimed in teaching spaces.

**The Faculty of Humanities at Leiden University** has developed a training programme which includes tools and training helping lecturers and tutors to foster an inclusive learning environment in class, online, and within the teacher-student dynamic, in which both students and instructors feel respected regardless of their ethnicity, religion, gender, sexual orientation, (dis)ability, age and socio-economic background. The programme comprises: 1) A module on inclusive education, 2) A module on implementing changes to the curriculum 3) An inclusivity pathway training 4) Implicit bias training, 5) An active bystander training that provides skills to challenge unacceptable behaviours, including those which may have become normalised over time ([Inclusive education - Leiden University \(universiteitleiden.nl\)](https://www.universiteitleiden.nl)).

#### *Intersectional approaches in tackling gender-based violence*

When studying gender-based violence, incorporating an intersectional perspective is essential. It provides insights into how individuals with diverse characteristics and backgrounds encounter unique types of violence and oppression. This understanding is crucial to address gender-based violence effectively.

The **UniSAFE toolkit** [Home - UniSAFE Toolkit \(unisafe-toolkit.eu\)](https://unisafe-toolkit.eu) offers guidance on designing effective policies and implementing concrete measures towards addressing gender-based violence. UniSAFE's outputs are based on a holistic framework – the 7P model – which will help with the design comprehensive policies, covering all aspects such as prevalence, prevention, protection, prosecution, provisions of services, and partnerships.

The UniSAFE toolkit is based on materials collected and analysed with the specific aim to develop guidance and tools for supporting institutional policy development and practice, along the 7P model. The materials underpinning the toolkit consist of the theoretical framework, two sets of policy mappings, a quantitative survey, in-depth interviews with victims/survivors, and institutional case studies. Additionally, nine workshops were run between November 2022 and June 2023 with researchers and experts to gather input for the development of tools to address and stop gender-based violence in higher education and research organisations.

Throughout the various components of the toolkit, intersectionality is addressed with practical tips and advice on how to incorporate intersectional approaches, ensuring inclusiveness and sensitivity in addressing gender-based violence.

#### 4.1.4. Challenges

It can be a challenge when introducing an inclusive GEP to avoid that the plan does not just incorporate a generic understanding of intersectionality, as this can lead to the plan being overly general “with limited or superficial performative activities that are not supported by clear objectives” (European Commission, 2022, p. 35). A generic inclusive GEP may fail to fully engage with an understanding of the experiences and outcomes of different groups and therefore to be unable to address different patterns of discrimination or [to] give different dimensions sufficient attention (European Commission, 2022, p. 35).

Translating a commitment on paper to concrete actions that promote equality for minoritised groups in research careers, organisations, and settings is a challenge that many institutions seeking to bring about change face (European Commission, 2022, p. 6). Awareness raising is considered another key challenge faced by many institutions regarding successfully implementing inclusive GEPs as is the promotion of an understanding of the lived realities of intersectional inequalities in the workplace.

Institutional resistance is a systemic barrier that may challenge the aims inherent in inclusive GEPs (Chaves & Benschop, 2023, p. 5). However, actively dealing with such resistances may illuminate inequalities, contest prevailing values and beliefs associated with those inequalities and construct a system of “alternative values and beliefs” (Van Den Brink & Benschop, 2018). In sum, resistance is not necessarily to be avoided; on the contrary, handling resistance can be seen as part of the process of transformation (Chaves & Benschop, 2023, p. 22).

#### **Monitoring Inclusive Gender Equality Plans**

Monitoring is an integral part of inclusive GEPs since a thorough monitoring from the early phases can ward off problems of implementation (Mour, 2022). Monitoring necessitates a regular and continuous approach to understand whether the organisation executes the GEP as planned (Chaves & Benschop, 2023, p. 318). Wroblewski and Lipinsky (2018) argue that monitoring can be a challenging because of difficulties in collecting the appropriate data to facilitate this process. There are three main areas to consider when monitoring inclusive GEPs: a) prevalence of GEP, b) implementation process of GEP and c) impact of GEP (Chaves & Benschop, 2023, p. 295). Other considerations to address to assure quality impactful monitoring include:

- Data collected should be underpinned by an intersectional inclusive approach to ensure the data gathered captures the experiences of all staff members.
- Quantitative and qualitative monitoring and evaluation instruments need to be available to gather data and to enhance organisational knowledge regarding challenges and barriers so as to allow for changes and developments of the IGEP actions to happen (Strid et al., 2023).

- Staff should have confidence in organisational policies to address discrimination and should feel safe to report any instances of discrimination they may experience.
- Staff and students should have access to equality, diversity and inclusion training that is impactful and part of wider institutional efforts for inclusive organisational cultures and practices to become embedded (European Commission, 2022).
- Facilities, digital tools and appropriate support measures must be accessible to all staff (European Commission, 2022).

Regular reviews of recruitment and HR policies are needed to monitor for biases and proactive measures to diversify applications, recruitment and retention, including at senior levels (European Commission, 2022). Regular reviews are also needed in relation to flexible work provisions, associated policies and of the organisational working culture to make sure that the arrangements are inclusive for all staff regardless of background (European Commission, 2022).

- Family and caring policies to ensure that they are fit for purpose and inclusive.
- Appropriate measures to be taken for academics and researchers to be facilitated, encouraged and supported to undertake inclusive research and teaching.
- The role of research funding policies in relation to researcher development and leadership schemes in supporting socially disadvantaged groups (European Commission, 2022).

## 4.2. Selected promising practices analysis

This section provides an analysis of promising practices selected by all implementing partners, following a common methodology and after careful consideration and consultation with the WP leader, who conducted a subsequent analysis. These practices were grouped according to the five domains:

- Leadership and decision making
- Work-life balance and organizational culture
- Recruitment and career progression
- Teaching and learning content
- Measures against gender-based violence including sexual harassment

It needs to be emphasised that, despite efforts to diversify the selection and to have all five domains included, none of the partners identified any inclusive practices within the “leadership and decision making” domain. The analysis thus follows the categorisation of the remaining four domains and focuses on two out of the three dimensions of NEXUS: intersectionality and intersectoriality. It also pays particular attention to different aspects of these practices, in

particular the way in which these are relevant to the context in which they are implemented, their effectiveness, and transferability, among others. The latter is especially important if these practices are to be considered as ‘promising examples’ which can be piloted in different institutional or national contexts.

**DOMAIN: WORK-LIFE BALANCE AND ORGANISATIONAL CULTURE**

Name of the practice	Pink Boxes
<b>Practice Owner</b>	<b>Department of Sociology, University of Warsaw</b>
<b>Partner proposing</b>	<b>AGH</b>
<b>Country implemented</b>	<b>Poland</b>

**Practice description**

The practice involves placing "pink boxes" that contain tampons and sanitary pads in toilets across the University. The campaign aims to fight taboos and menstrual exclusion. There are 45 boxes located at faculties, various institutes, and in the university library. The pink boxes are targeted at all women among the staff and student population, especially those who are in difficult economic situations.

**Inequalities addressed, domains covered and external stakeholders involved**

Inequalities addressed		Domains		External stakeholders involved	
<b>Sex and/or gender</b>	Yes	<b>Work-life balance and organisational culture</b>	Yes	<b>Other RPOs/RFOs</b>	<b>No</b>
<b>Social class/socioeconomic background</b>	Yes	<b>Leadership and decision making</b>	No	<b>Civil Society Organisation(s) (CSOs)</b>	<b>Yes</b>
<b>Age</b>	Yes	<b>Recruitment and career progression</b>	No	<b>Public Authorities</b>	<b>No</b>
<b>Disability</b>	Yes	<b>Research and teaching content</b>	no	<b>Private Companies</b>	<b>No</b>
<b>Nationality</b>	No	<b>Measures against gender-based violence including sexual harassment</b>	No	<b>Others</b>	<b>No</b>
<b>Ethnicity</b>	No	<b>Other: health and body</b>	Yes		
<b>Religion/belief</b>	No				
<b>Sexual Orientation</b>	No				
<b>Gender Identity</b>					
<b>Other</b>	Yes				

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### Summary of practice evaluation

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While aimed at all menstruating persons across the university, people with disabilities are included as the boxes are placed in the toilets which accommodate for the disabled. It is also aimed at those who experience economic poverty. It addresses organisational culture as it is connected with the domain of work-life balance, as the practice goes towards stopping women having to withdraw from public spaces due to period poverty. It is very relevant to the Polish context as period poverty is a significant issue in the country. The practice is implemented in Warsaw, which is particularly affected by high costs of living. Finally, the practice can be characterised as innovative as it symbolises, in a practical manner, the way in which women and female bodies are present on the university campus. Further, the practice helps to raise awareness thus promoting an inclusive organisational culture in the university. It has the potential to be fully transferable and scalable to other institutions and organisations, including those outside of the university context.

*“The practice changes the comfort of work, women working in buildings far from shops or pharmacies, who have, for example, irregular periods or health problems, can feel safe. They may work long hours at the university. It improves the comfort of women students who struggle with health and financial problems”.*

Name of the practice	Equal Opportunities Plan
<b>Practice Owner</b>	Hungarian Research Network, Institute of Natural Sciences (HUN-REN TTK)
<b>Partner proposing</b>	BZN
<b>Country implemented</b>	Hungary

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### Practice description

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The initiative was developed as part of the organisational Equal Opportunities Plan. Three concrete actions of the plan are particularly relevant and thus chosen as a promising practice for the analysis: (a) Training on the integration of the gender dimension in research (Action 4.1); (b) Sensitising staff to equal opportunity issues through training (Action 5.1); (c) An equal opportunities reporting mechanism, allowing staff to make complaints through an anonymous online form and the organisation of an equal opportunities discussion forum for all staff twice annually (Action 5.2). The practice was developed in cooperation with two CSOs: the Association of Hungarian Women in Science for STEM career promotion activities and with Hétfa, which delivers awareness training.

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**Inequalities addressed, domains covered and external stakeholders involved**


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Inequalities addressed		Domains		External stakeholders involved	
Sex and/or gender	Yes	Work-life balance and organisational culture	Yes	Other RPOs/RFOs	No
Social class/socioeconomic background	Possibly	Leadership and decision making	No	Civil Society Organisation(s) (CSOs)	Yes
Age	Yes	Recruitment and career progression	No	Public Authorities	No
Disability	Possibly	Research and teaching content	Yes	Private Companies	No
Nationality	Possibly	Measures against gender-based violence including sexual harassment	Yes	Others	No
Ethnicity	Possibly	Other	No		
Religion/belief	Possibly				
Sexual Orientation	Possibly				
Gender Identity					
Other: family status	Yes				

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**Summary of practice evaluation**


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This practice explicitly addresses sex and gender. However, other inequalities may also be covered as the Equal Opportunity Committee is mandated to address irregularities in the implementation of the Equal Opportunities Act, which covers not only gender but also age, socio-economic background, disability, nationality, religion, sexual orientation, gender identity and family status. In relation to domains, the discussion forum for equal opportunities is directly relevant for organisational culture, through its intention to address all issues horizontally and involve any interested staff. The complaints procedure is relevant to the GBV domain and the trainings to the research content integration domain. While the innovativeness of this pack of actions is limited, they are transferable to other RPOs.

*“The discussion forum for equal opportunities is directly relevant for the organisational culture, through its intention to address all issues horizontally and involve any interested staff”.*

**DOMAIN: RECRUITMENT AND CAREER PROGRESSION**

<b>Name of the practice</b>	<b>Action Plan 3.4</b>
<b>Practice Owner</b>	<b>Universita di Genoa</b>
<b>Partner proposing</b>	<b>IIT</b>
<b>Country implemented</b>	<b>Italy</b>

**Practice description**

The main goal of this practice is to increase awareness of the possible biases that influence recruitment and career progression decisions. It contains several actions, such as training on unconscious bias, and a feasibility study for allocating staffing points to the Departments and rewarding the structures that have reduced gender asymmetries. The targets of both actions are senior staff and staff in leadership and decision-making positions.

**Inequalities addressed, domains covered and external stakeholders involved**

Inequalities addressed		Domains		External stakeholders involved	
<b>Sex and/or gender</b>	Yes	<b>Work-life balance and organisational culture</b>	No	<b>Other RPOs/RFOs</b>	<b>No</b>
<b>Social class/socioeconomic background</b>	Yes	<b>Leadership and decision making</b>	No	<b>Civil Society Organisation(s) (CSOs)</b>	<b>No</b>
<b>Age</b>	Yes	<b>Recruitment and career progression</b>	Yes	<b>Public Authorities</b>	<b>No</b>
<b>Disability</b>	Yes	<b>Research and teaching content</b>	No	<b>Private Companies</b>	<b>Yes</b>
<b>Nationality</b>	Yes	<b>Measures against gender-based violence including sexual harassment</b>	No	<b>Others</b>	<b>No</b>
<b>Ethnicity</b>	Yes	<b>Other</b>	No		
<b>Religion/belief</b>	Yes				
<b>Sexual Orientation</b>	Yes				
<b>Gender Identity</b>					
<b>Other</b>					

## Summary of practice evaluation

Courses are delivered on unconscious bias, so that management staff are trained on the subject, and do not use discriminatory language or engage in discriminatory practices. This initiative goes to the root of all discriminations, by correcting unconscious cultural biases that shape choices and behaviours in potentially offensive and discriminatory ways in everyday work, academic life and recruitment and promotion processes. Expert consultants were involved in the preparation and administration of the course. While the practice is not particularly innovative as other GEPs include similar programmes, it can be transferred and replicated with no significant costs and organisational difficulties.

*“[...] because when you have an unconscious bias, it means that in the way you talk, the way you behave, the way you act, you don't understand that you are making veiled discriminations that are not only related to gender, but also to sexual or religious identity, etc. Acting on unconscious bias allows you to intervene on the various dimensions of discrimination”.*

<b>Name of the practice</b>	<b>Roma Education Foundation</b>
<b>Practice Owner</b>	<b>Open Society (Soros Foundation) and World Bank</b>
<b>Partner proposing</b>	<b>NU</b>
<b>Country implemented</b>	<b>Switzerland and Hungary/Serbia</b>

## Practice description

The Roma Education Fund (REF) is an international foundation established in 2005 and dedicated to closing the gap in educational outcomes between Roma and non-Roma individuals. With an active and growing network of representative offices across Central, Eastern, Southeastern Europe and Turkey, REF provides grants and scholarships to entities and individuals who share its belief in inclusive education and non-segregated schools and classrooms. The organisation helps Roma people to finish education on all levels, organises tutors and mentors, and is also active in the institutionalisation of inclusive education for Roma people by working with governments.



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**Inequalities addressed, domains covered and external stakeholders involved**


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Inequalities addressed		Domains		External stakeholders involved	
Sex and/or gender	No	Work-life balance and organisational culture	No	Other RPOs/RFOs	Yes
Social class/socioeconomic background	Yes	Leadership and decision making	No	Civil Society Organisation(s) (CSOs)	Yes
Age	Yes	Recruitment and career progression	Yes	Public Authorities	Yes
Disability	No	Research and teaching content	Yes	Private Companies	Yes
Nationality	No	Measures against gender-based violence including sexual harassment	No	Others	No
Ethnicity	Yes	Other			
Religion/belief	No				
Sexual Orientation	No				
Gender Identity					
Other					

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**Summary of practice evaluation**


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REF implements programmes which promote the benefits of education and the integration of members of Roma communities with non-Roma communities, from preschool level.

*“For the institutional level, there is good collaboration with governments in all countries where REF operates. The programs of REF are always done with Ministries of Education, but other institutions as well, related to education on the local level. Some of the project was embraced by governments as role models and became state budget funded programs.”*

Its programmes offer tuition and mentoring at all levels from primary to higher education, thus addressing the inclusion of Roma people in educational settings. The programme also supports members of the Roma community in gaining the skills necessary for future employment. They also recently started the ALUMNI project, which aims at providing further assistance with career progression after graduation. The programme involves several external stakeholders, and avails of grants from countries such as Sweden and Austria as part of their development programmes, and from NGOs. REF also works with public authorities to embed their methods and models for mainstreaming Roma children and student into the education system. The organisation also

organises internships with companies to support the employment of members of the Roma community. The practice shows an innovative approach as it raises awareness from pre-school level, tackling family and environmental impacts of Roma disadvantage and discrimination, and embedding some of the actions into official policies. Some of the programme components can be transferred to other contexts which are relevant for other vulnerable communities.

Name of the practice	Inform about unconscious cognitive biases in recruitment
<b>Practice Owner</b>	<b>Mission "Women-Men Equality"</b>
<b>Partner proposing</b>	<b>UM</b>
<b>Country implemented</b>	<b>France</b>

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### Practice description

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This practice consists of a workshop that is offered to human resources and academic staff on unconscious cognitive biases. Administrative functions, academic positions (engineer, teacher, researcher) and responsibilities are very gendered at the University of Le Mans. University recruitment is carried out in two main ways: by competition (public service) and by contract (common law). A committee (jury) examines the applications and interviews the persons selected for the interview. However, studies show the existence of unconscious cognitive biases in the selection process during both application reviews and interviews.

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### Inequalities addressed, domains covered and external stakeholders involved

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Inequalities addressed		Domains		External stakeholders involved	
<b>Sex and/or gender</b>	Yes	<b>Work-life balance and organisational culture</b>	No	<b>Other RPOs/RFOs</b>	<b>No</b>
<b>Social class/socioeconomic background</b>	Yes	<b>Leadership and decision making</b>	Yes	<b>Civil Society Organisation(s) (CSOs)</b>	<b>No</b>
<b>Age</b>	Yes	<b>Recruitment and career progression</b>	Yes	<b>Public Authorities</b>	<b>No</b>
<b>Disability</b>	Yes	<b>Research and teaching content</b>	No	<b>Private Companies</b>	<b>No</b>
<b>Nationality</b>	Yes	<b>Measures against gender-based violence including sexual harassment</b>	No	<b>Others</b>	<b>Yes</b>
<b>Ethnicity</b>	Yes	<b>Other</b>	No		
<b>Religion/belief</b>	Yes				

<b>Sexual Orientation</b>	Yes
<b>Gender Identity</b>	
<b>Other</b>	

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### Summary of practice evaluation

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This action tackles unconscious bias in recruitment and specifically targets gender as women may be particularly discriminated at different stages of their careers.

*“The action requires participants to reflect on the relevance of the tools, their appropriation and their sharing in the recruitment commissions”.*

The initiative also aims to combat other unconscious biases, which interact with gender bias, for example, physical appearance, age, disability, ethnicity etc. The practice mainly addresses recruitment and career progression. However, if recruitment to management level positions is considered then the practice can also be partially applicable to the leadership and decision-making domain. The action is transferable to other institutional and national contexts.

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### DOMAIN: RESEARCH AND TEACHING CONTENT

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<b>Name of the practice</b>	<b>The Purple Certificate Programme</b>
<b>Practice Owner</b>	<b>Sabancı University</b>
<b>Partner proposing</b>	<b>KU</b>
<b>Country implemented</b>	<b>Turkey</b>

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### Practice description

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The Purple Certificate Program aims to contribute to the elimination of gender-based discrimination by raising awareness on gender equality among high school teachers. The programme conducts work with high school teachers in cities throughout Turkey to promote gender awareness and gender equality in schools, classrooms, class activities, and educational materials. The objective is to build a culture of gender awareness among high school teachers and students, to reflect this awareness in class activities, and thus create wider transformation in the educational sphere towards gender equality. While it is not currently delivered in third level contexts, its relevance and high potential for transferability are the main factors for considering this action as a promising practice, which can be applied to RPOs. The programme also addresses sexual education at high-school level, targeting other inequalities.

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**Inequalities addressed, domains covered and external stakeholders involved**


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Inequalities addressed		Domains		External stakeholders involved	
Sex and/or gender	Yes	Work-life balance and organisational culture	Possibly	Other RPOs/RFOs	No
Social class/socioeconomic background	Yes	Leadership and decision making	Possibly	Civil Society Organisation(s) (CSOs)	Yes
Age	Yes	Recruitment and career progression	No	Public Authorities	No
Disability	Yes	Research and teaching content	Yes	Private Companies	Yes
Nationality	No	Measures against gender-based violence including sexual harassment	No	Others	No
Ethnicity	Yes	Other	No		
Religion/belief	Yes				
Sexual Orientation	Yes				
Gender Identity					
Other	No				

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**Summary of practice evaluation**


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The one-week Purple Certificate Program Gender Training includes trainings sessions for teachers and teacher candidates, and regional workshops for teachers. Within the programme, “Purple Files” are developed, containing gender-sensitive, thematic classroom materials. In addition to gender/sex specific subjects, Purple Files include in-class activities which encourage students to role-play and to empathise with people with different economic backgrounds, ages, religious beliefs, abilities, ethnicities, and nationalities. In relation to stakeholders, the initiative directly involves public and private school teachers in Turkey.

*“The project started with a very small groups of teachers. But since it is a project that has been going on for 16 years, we have reached a large group. The number of teachers who attended all the trainings and were entitled to receive certificates is over 1100. This number increases even more when you count the participants in trainings and webinars. Considering the number of students each teacher reached, I can say that 1 million people were reached”.*

It is also supported by NGOs and activists. This practice provides an interesting example of both intersectional and intersectoral approaches. It is also innovative in the Turkish context as it focuses

on sexual orientation education at high school level, and covers other inequalities, such as age, disability, migration, and socioeconomic status. It is effective as to date it has reached over 5000 individuals. It is also transferable as it can be adapted to other contexts beyond second-level education and can also be used in RPOs.

Name of the practice	Quota Principle for male/female student applicants
<b>Practice Owner</b>	<b>Sofia University</b>
<b>Partner proposing</b>	<b>SU</b>
<b>Country implemented</b>	<b>Bulgaria</b>

### Practice description

This practice is included in the SU official Guide for Student Applicants. It is targeted at Bulgarian applicants that apply for nationally subsidised places at the university. It consists in ranking separately female and male applicants. The practice is based on a decision of the Academic Council of Sofia University and is grounded in the following rules (Art. 32): (1) The ranking is carried out in a descending order of the competition ball and in the order of the desired specialties, forms and grounds of admission indicated by the candidate, according to the confirmed places for the categories (men and women) and quotas; and: (4) Vacant places for men in the course of ranking are transformed for women and vice versa.

### Inequalities addressed, domains covered and external stakeholders involved

Inequalities addressed		Domains		External stakeholders involved	
<b>Sex and/or gender</b>	Yes	<b>Work-life balance and organisational culture</b>	No	<b>Other RPOs/RFOs</b>	<b>No</b>
<b>Social class/socioeconomic background</b>	No	<b>Leadership and decision making</b>	No	<b>Civil Society Organisation(s) (CSOs)</b>	<b>No</b>
<b>Age</b>	No	<b>Recruitment and career progression</b>	No	<b>Public Authorities</b>	<b>No</b>
<b>Disability</b>	No	<b>Research and teaching content</b>	Yes	<b>Private Companies</b>	<b>No</b>
<b>Nationality</b>	No	<b>Measures against gender-based violence including sexual harassment</b>	No	<b>Others</b>	<b>No</b>
<b>Ethnicity</b>	No	<b>Other</b>	No		
<b>Religion/belief</b>	No				

<b>Sexual Orientation</b>	No
<b>Gender Identity</b>	No
<b>Other</b>	No

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### Summary of practice evaluation

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This practice ensures that male and female applicants are ranked separately and, by applying the quota principle, it also ensures that male and female applicants are treated equally. It applies to a wide range of disciplines and goes beyond the university education context. As a result, the practice results in more balance outcomes in terms of the opportunities for male/female applicants and in terms of participation in the different professions. It is possibly transferable to different contexts, providing that it is not in breach of local or national legislation. It could also be expanded to other target or vulnerable groups.

*“Main need is to avoid feminisation in humanities and the opposite in engineering and mathematics. Usually, female applicants earn higher ball and without quota there will be no chance for male applicants”.*

<b>Name of the practice</b>	<b>Embedding Anti-Racism in the Community Development and Youth Work Programme (TU Dublin)</b>
<b>Practice Owner</b>	<b>The Community Development and Youth Work programme</b>
<b>Partner proposing</b>	<b>TU Dublin</b>
<b>Country implemented</b>	<b>Ireland</b>

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### Practice description

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The initiative addresses the student population on the Community Development and Youth Work (CDYW) programme delivered at TU Dublin. It currently addresses students on this specific programme, yet it goes beyond the teaching and learning environment as it directly tackles racism in placement settings, which resemble future workplaces. At its core, the initiative supports embedding anti-racism in the CDYW programme in a holistic way, as it maps the module content and introduces anti-racism content in each module. Furthermore, it addresses anti-racism by providing workshops and pre-placement training to all students on the programme, regardless of their background. This way, it enables those coming from minority backgrounds to adequately react when experiencing racist behaviour during placement, and also equips those coming from more privileged backgrounds with tools to react when they witness racist behaviour.

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**Inequalities addressed, domains covered and external stakeholders involved**


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Inequalities addressed		Domains		External stakeholders involved	
Sex and/or gender	Yes	Work-life balance and organisational culture	Possibly	Other RPOs/RFOs	No
Social class/socioeconomic background	No	Leadership and decision making	Possibly	Civil Society Organisation(s) (CSOs)	Yes
Age	Yes	Recruitment and career progression	Possibly	Public Authorities	No
Disability	No	Research and teaching content	Yes	Private Companies	Yes
Nationality	Yes	Measures against gender-based violence including sexual harassment	No	Others	No
Ethnicity	Yes	Other	Yes		
Religion/belief	Yes				
Sexual Orientation	No				
Gender Identity	No				
Other	No				

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**Summary of practice evaluation**


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The main inequalities addressed by this initiative are those linked to race, ethnicity and nationality. Embedding anti-racism is at the core of this initiative, and 'race' in this context is understood broadly, to include diverse ethnic and migration backgrounds. It also adopts an intersectional approach in relation to the students' training as it takes positionality as a core principle and considers multiple inequalities for defining power relations. The initiative primarily addresses the research/teaching content domain. However, other domains can be possibly addressed in a wider institutional context, as those involved in the initiative also contributed to the TU Dublin Race Equity Action Plan. In addition, data collected from students as part of the initiative is an important element of this feedback.

*“Other inequalities can be addressed by adapting tools created by this initiative. First of all, it is intersectional, and provides the 'positioning' tool which allows for multiple inequalities to be considered. It is a framework transferable also to other settings, either to other programmes delivered in TU Dublin, or outside of the HE settings.”*

The initiative involved two NGOs related to anti-racism when developing the workshops, training and other tools: the Irish Network Against Racism (INAR) and the Irish Immigrant Council (IIC). As the initiative mainly targets students undertaking placements in private/community organisations, these organisations are also involved. The programme is strongly relevant to the changing nature of the student population in Ireland and while it is not entirely novel in the Irish context, it seems to be relatively advanced compared to other initiatives in the HE environment. The initiative can be transferred to counter other inequalities. It is also transferable to different settings within and beyond higher education.

#### **DOMAIN: MEASURES AGAINST GENDER-BASED VIOLENCE INCLUDING SEXUAL HARASSMENT**

<b>Name of the practice</b>	<b>Code of Practice for the Prevention and Combating of Harassment and Sexual Harassment</b>
<b>Practice Owner</b>	<b>Frederick University</b>
<b>Partner proposing</b>	<b>FredU</b>
<b>Country implemented</b>	<b>Cyprus</b>

#### **Practice description**

The practice stems from the university commitment to being an equal opportunities organisation. The university also adopts a non-discriminatory policy in relation to ethnicity, race, religion or belief, disability, gender and sexual orientation. A series of policy statements are adopted based on this, and can be summarised as follows: (a) establish clear guidelines on non-acceptable behaviour and mechanisms for allowing the submission and review of complaints; (b) maintain due processes for examining grievances that adhere to core principles of fair investigation; (c) support actions for educating the university community, as well as the society at large, on discrimination issues and track performance; (d) record information relating to equality issues including but not limited to matters of representation and progression and gender issues, including gender pay gaps.

Within the practice, discrimination is considered to be any act that treats a member of the community, whether an employee, a student, or a visitor, differently with adverse effects due to



their ethnicity, race, colour, religion or belief, disability, gender, or sexual orientation. Harassment is considered to be any unwelcome verbal or physical conduct that makes the subject feel insulted, humiliated or intimidated. While an exhaustive description of all behaviours that would constitute discrimination and harassment is not possible, the practice document includes examples of such behaviours. The design of the practice is based on two institutional surveys and a detailed analysis of responses, which formulated the baseline for each action.

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### Inequalities addressed, domains covered and external stakeholders involved

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Inequalities addressed		Domains		External stakeholders involved	
Sex and/or gender	Yes	Work-life balance and organisational culture	No	Other RPOs/RFOs	No
Social class/socioeconomic background	Yes	Leadership and decision making	No	Civil Society Organisation(s) (CSOs)	Yes
Age	Yes	Recruitment and career progression	No	Public Authorities	Yes
Disability	Yes	Research and teaching content	No	Private Companies	No
Nationality	Yes	Measures against gender-based violence including sexual harassment	Yes	Others	No
Ethnicity	Yes	Other	No		
Religion/belief	Yes				
Sexual Orientation	Yes				
Gender Identity					
Other					

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### Summary of practice evaluation

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The Code of Practice for the Prevention and Combating of Harassment and Sexual Harassment is part of the measures that the University takes against gender-based violence including sexual harassment. The university adopts a non-discrimination policy as explicitly addressed in article 4(c) of its Charter according to which no discrimination or bias, whether obvious or tacit, should exist in its community in relation to ethnicity, race, colour, religion or belief, disability, gender, or sexual orientation. However, when the Code of Practice was developed these inequalities were not explicitly mentioned.

*“The university needs to be a safe place for all its members, so that the community can flourish without having to deal with this kind of behaviours. Everybody needs to have a safe space that will allow them to concentrate on other things rather than these problems”.*

In relation to the effectiveness, it has been noted that despite the recent introduction of the Code, members of staff have expressed their satisfaction with the practice, and the need for more training to take place in the university. The practice is also transferable and can be adapted to other professional environments.

Name of the practice	“Speak Out”
<b>Practice Owner</b>	<b>All universities and institutes of technology in the country (18 HEIs in total)</b>
<b>Partner proposing</b>	<b>TU Dublin</b>
<b>Country implemented</b>	<b>Ireland</b>

### Practice description

Speak Out is an online and anonymous reporting platform for incidents of bullying, cyberbullying, harassment, discrimination, hate crime, coercive behaviour/control, stalking, assault, sexual harassment, sexual assault, and rape. The practice helps to find relevant supports and highlight formal reporting procedures, should the reporter/survivor wish to use them. It is led by the Psychological Counsellors in Higher Education Ireland (PCHEI) and funded by the Department of Further and Higher Education, Research, Innovation and Science. A pilot study was conducted in the first instance with seven universities through focus groups and from that it was expanded to the 19 HEIs involved.

### Inequalities addressed, domains covered and external stakeholders involved

Inequalities addressed		Domains		External stakeholders involved	
<b>Sex and/or gender</b>	Yes	<b>Work-life balance and organisational culture</b>	No	<b>Other RPOs/RFOs</b>	Yes
<b>Social class/socioeconomic background</b>	Yes	<b>Leadership and decision making</b>	No	<b>Civil Society Organisation(s) (CSOs)</b>	Yes
<b>Age</b>	Yes	<b>Recruitment and career progression</b>	No	<b>Public Authorities</b>	Yes

<b>Disability</b>	Yes	<b>Research and teaching content</b>	No	<b>Private Companies</b>	No
<b>Nationality</b>	Yes	<b>Measures against gender-based violence including sexual harassment</b>	Yes	<b>Others</b>	
<b>Ethnicity</b>	Yes	<b>Other</b>			
<b>Religion/belief</b>	Yes				
<b>Sexual Orientation</b>	Yes				
<b>Gender Identity</b>	Yes				
<b>Other</b>					

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### Summary of practice evaluation

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Speak out takes an intersectional approach, mindful that GBV does not necessarily happen in isolation and that there is a diversity of cultural elements to it such as gender, racial, sexuality, ability elements (amongst others). Including all those elements in the reporting tool allows for people to name, and expand, on them (for example, cite racial motivations for the sexual crime committed). The initiative raises awareness and assists in achieving a zero-tolerance culture in relation to GBV in HEIs in Ireland. Beyond GBV, other domains are also tackled, as instances related to discrimination of any kind within the organisation may be reported through the tool. The process of developing this initiative was highly participatory, involving members of the Counselling Staff at universities, who were trained to work in this area. ‘Speak Out’ is an innovative initiative as anonymous tools for reporting GBV in Higher Education are only in place in a handful of European universities. Another aspect of its innovativeness is its nation-wide approach. The initiative is also fully transferable, providing that certain conditions are met in advance, such as high-level support from government as well as from senior management.

*“The initiative is definitely transferable to other sectors. However, you need to have trained staff. In universities we were lucky because we had all the in-house expertise. We also have the backing of government, with a policy framework in place. So, the initiative, needs to be embedded in a strategic plan of some sorts.”*

## 5. Implementing partners assessment: GEP data collection practices and current GEP evaluation.

This section focuses on the analysis of existing GEPs among NEXUS implementing partners and considers both data collection practices and the content of GEPs. While different aspects of the two are carefully considered, these were particularly scrutinised in terms of their intersectional approach, as inclusivity is at the core of the NEXUS project.

## 5.1. Data collection practices: comparative analysis

The following analysis is based on a research-based self-assessment conducted by each partner as part of NEXUS WP2. Each RPO followed the same methodological steps, designed by TU Dublin, consisting of: document analysis (data collected for the purpose of designing the GEP in each participating institution), three interviews with personnel involved in the data collection, and one focus group with personnel engaged with the data collection and the GEP development. Finally, each RPO was asked to fill in an overall self-assessment. Partners were provided with a common template that included a variety of questions related to data collection practices, inequalities considered during data collection, domains and stakeholders involved, institutional engagement, relevance, sustainability, monitoring and evaluation tools, legal obligations and constraints at national and institutional levels, as well as obstacles encountered and proposed ways to improve **future data** collection practices. All of these aspects are the subject of the following analysis, with an emphasis on intersectionality, domains covered, and intersectoriality. All quotes presented in this analysis derive from the summary grids filled by each of the RPOs. A summary of the data collection document analysis, based on the grids completed by each partner, is included in the Annex.

### 5.1.1. Inequalities considered during data collection (GEP preparation)

Table 5.1: Inequalities identified by partners as available for the GEP data collection/gathering

	AGH	BZN	FredU	IIT	KU	SU	TU Dublin	NU	UM
Sex and/or gender	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Social class/socioeconomic background	Yes	No	Yes	Yes	No	No	No	No	No
Age	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes
Disability	No	No	Yes	Yes	Yes	No	No	Yes	Yes
Nationality	No	Yes	Yes	Yes	Yes	No	No	Yes	No
Ethnicity	No	No	Yes	No	No	No	Yes	Yes	No
Religion/belief	No	No	Not anymore	No	No	No	No	No	No
Sexual Orientation	Yes	No	No	No	No	No	No	No	No
Gender identity	Yes	No	No	No	No	No	Yes	No	No
Other	Yes	No		No		No	No		No

In relation to the relevant inequality grounds, **AGH** considered **primarily sex and gender, social position** in the structure (access to resources, capital, position), **age**, and **sexual orientation**. In addition, family situation (having children and dependents) as well as experience of harassment

and sexual harassment were also referred to. With regards to these, the partner analysed the **careers of people in various positions**, and the **differences in experiences of people at the beginning of their careers and later related to discrimination**. Differences due to **age and sexual orientation** were also examined. The focus group further revealed that taking gender as a primary indicator was a conscious decision related to the fact that it was the institutions first GEP:

*"Moving away from intersectionality to some extent was a conscious decision on our part. Because we considered whether to design certain activities, or to suggest them, in relation to, for example, women with disabilities, men with disabilities, transgender people, older people, younger people and so on.... And we thought that if we start to nuance things in this way, everything gets blurred, that is, we have to (...) sometimes take on this subject of action, essentialise it a bit, in order to do something. (...) we have to design something without going into details, whether it's a young person, an elderly person or something else, but at this stage we just have to say that it's designed for women or with women or men (with caring roles) in mind."*

**BZN** stated that **gender/sex** data were provided in a compulsory manner (data provision for authorities), along with other indicators, such as **age**. In the specific case of the GEP, data were collected to generate quantitative data related to gender across the entire institution and in smaller units. The following were analysed by the partner: **the relationship between gender and pay in various positions**, and the **relationship between gender and retention potential** (i.e. the length of employment).

**FredU** reported that **citizenship/nationality** is recorded (for both, students and staff) upon either registration or hiring (data forwarded to the Ministry of Education on annual basis). **The institution also records age and disability** but these are not published. **Religion and belief are no longer recorded** while **sexual orientation and gender identity are not recorded** even though there have been cases of students revealing their gender identity (different than sex) to the university.

**IIT** noted that, as the research conducted for the purpose of the GEP took other dimensions (in addition to gender) into consideration, their data collection approach can be characterised as intersectional. Some of the data could not be gathered due to privacy reasons, for example, sexual orientation, religious orientation or ethnicity. While the focus of this GEP remains on gender, the interviews confirmed a need to adopt a more inclusive approach and to examine additional indicators:

*"We would like to extend this type of analysis to nationality as well, because we have a lot of non-Italian staff, because a large part of our staff comes from abroad. And investigate whether in some way nationality could be another factor of inequality. The first step of this analysis (on gender) was to try to see if it could fit as a model; once we realised that it does indeed seem to be a match, then the idea is to extend it to other dimensions."*

**KU** emphasised that as this is the first GEP in their institution, **assessment mainly focused on gender**. Data on sex is thus available for both students and staff. However, data is available (although not published) from secondary data on indicators such as: **nationality** (used for work visit plans and recruitment), **age** (usage complicated as protected by the personal data protection law), and **disability**. In addition to relevant inequalities, **data on seniority** is also available. Nonetheless, informants felt that the data collection is not currently intersectional. One of the interviewees elaborated on this issue, emphasising that the focus on gender was required as this was first time a survey such as the one administered had been conducted in the institution.

*"Do people think they are treated equally at Koç University?" The aim was to look at this and these were examined with male-female breakdowns. Therefore, I cannot say that there is a very large-scale sub-breakdown because this survey was the first survey conducted on this subject and asking questions about different breakdowns could lead to deviation from the general purpose. In the first place, we wanted to look at the male-female breakdown in the first survey. Future surveys will definitely need to look at different inequalities."*

In the case of **TU Dublin**, extensive data was available in terms of **gender** (e.g., staff and different categories and grades, students by discipline). **Data on other indicators was also available but scattered** and not always allowing for universal assessment. For example, some information is provided by staff to HR on a voluntary basis only, and there was also data collected for the Athena SWAN (AS) application through focus groups and voluntary survey. These indicators included **gender identity** (AS application data collection) and **ethnicity/race** (HR data and data collected

for AS application). According to one of the interviewees, it was important to incorporate ethnicity and race:

*"We knew that our black and ethnic minority staff had a lot of difficulties in getting recognition and recognition of their qualifications and talents and things like that and we also knew that our staff with disabilities felt very marginalised (...). And, as well, this was an opportunity for us to investigate these things a little bit more in light of national priorities, because we knew that race equity was at that time beginning to come on to the higher education agenda and disability has always been on the higher education agenda".*

Data on ethnicity is also available in relation to students. There is also data on disability, but it is not currently linked with the GEP.

**NU** reported that while data is gathered in relation to sex/gender, age, disability, nationality, and ethnicity, individuals have a choice of not disclosing this information. **SU** did not collect any data in addition to sex/gender. In **UM**, the comparative status report should make it possible to target gender inequalities more effectively, and to cross-reference them with other indicators (age, seniority). However, while there are concrete measures to tackle multiple inequalities, the analysis conducted for the purpose of the GEP is primarily focused on gender.

### 5.1.2. Domains addressed during data collection

Table 5.2: Domains identified by partners as considered during GEP data collection and analysis

Domains explored	AGH	BZN	FredU	IIT	KU	SU	TU Dublin	NU	UM
Work-life balance and organisational culture	Yes	Yes	Not yet	Yes	no	No	Yes	No	Yes
Leadership and decision making	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
Recruitment and career progression	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes
Research and teaching content	Yes	Yes	Not yet	Yes	Yes	No	No	N/A	Yes

Measures against gender-based violence including sexual harassment	Yes	Yes	Yes	Yes	Yes	No	No (not in the AS data)	No	
Other	No	No		No		No	N/A		

**AGH** included all five domains in their analysis, and each one is examined in a separate paragraph and in-depth data. More specifically, as a result of a high prevalence of harassment, institutional actions were designed for the GEP and implemented into the structure of AGH. The Equality Ombudsman has been operating since 2022, collecting data on the prevalence of harassment at the university. The Ombudsman collects data based on reports. Furthermore, data is collected on student recruitment and the composition of recruitment committees, as well as data on participation in projects (annual), and promotions (annual). Annual data collection is coordinated by the GEP team, and the director of the Research Project Service Center is involved in the data collection process.

**BZN** noted that although the GEP addresses all five domains, the actions were not developed “necessarily directly from the data collection or the data analysis”. Indeed, the focus group reveals a rather general approach to these issues, for example:

*“In recruitment, gender equality is present in an implicit manner, HR avoids gender discrimination in advertising positions, and also in the selection process (i.e. they are “blind” to gender). In selection, only the qualifications and the suitability for the job are considered”.*

In this organisation, the domains were addressed by analysing examples of existing GEPs (from other institutions) and then adapting actions which were considered to be relevant to BZN.

The main domains addressed by **FredU** in the context of gender equality were predominantly leadership and decision-making, as well as measures against gender-based violence (including sexual harassment). Measures against gender-based violence are addressed through yearly University campaigns on GBV, as well as through the code of conduct on harassment, including sexual harassment. In relation to the leadership domain, it was noted that while data is available, it would require analysis; similar issues apply to the recruitment and career progression domains. This partner also reported that there have been recent efforts to start to “record the research and teaching content in relation to gender equality”, however, this is only at the initial stage. Finally, the GEAM tool was distributed among the staff with the conclusion that work-life balance and organisational culture is the “weakest” domain in the organisation.



**IIT** reported that their GEP includes analysis and improvement measures for each of the domains identified. For each planned action there is a target, action specification, timeline, a specification of who is leading the action and the type of connection with the UN Agenda 2030 SDGs.

**KU** noted that their GEP includes analysis on the following: recruitment, career development, promotion, career breaks, and parental leave/return. As they stated in the evaluation, while data on these domains was collected, it is not publicly available. In addition, there was a survey conducted regarding security on campus, thus partially addressing gender-based violence, including the sexual harassment domain.

In **TU Dublin**, data was gathered in line with the AS requirements. Three relevant domains were addressed in the AS action plan and were included in the AS application. The AS application included the analysis of the following: (1) key transition points, including recruitment, training, career development and promotion (thus relating to recruitment and career progression); (2) flexible working and managing career breaks, including maternity leave and return, paternity, adoption and parental leave, flexible work, transition from part-time, childcare and caring responsibilities (which can be classified under the work-life balance domain); (3) organisational culture, including gender representation, workload, institutional policies, timing of meetings, visibility of role models, outreach activities and leadership (which overlaps between the organisational culture and leadership domains). It also addresses the issue of supporting trans people. In terms of leadership and decision making, a gender breakdown is provided in relation to different leadership roles. However, while AS is key element of the GEP in TU Dublin, members of the focus group also referred to it as to a 'catalyst' rather than a finished product:

*"The main dimensions of gender equality underpinning TU Dublin's data collection practices were initially directly related to the AS application. However, gender equality has become an institution wide focus - with gender equality seen as increasingly central to research content. AS is seen as a catalyst within TU Dublin regarding the importance of collecting intersectional data - specifically that 'more' data needs to be collected for example, on race/ethnicity and disability"*

### 5.1.3. Intersectoriality: external stakeholders involved during data collection

Table 5.3: Types of stakeholders involved during the development of partners' GEPs

External stakeholders involved	AGH	BZN	FredU	IIT	KU	SU	TU Dublin	NU	UM
Other RPOs/RFOs	Yes	N/A	No	No	No	No	No	No	No
Civil Society Organisation(s) (CSOs)	No	N/A	No	Yes	No	No	No	No	No
Public Authorities	No	N/A	Partial	Yes	No	No	Yes	No	Yes
Private Companies	No	N/A	No	Yes	No	No	No	No	No
Others	Yes	N/A	No	No		No	No		

**AGH** consulted research teams with other universities, as well as researchers from outside of the university, regarding quantitative analysis. More specifically, they consulted the team from the Jagiellonian University, and the University of Gdansk in relation to tools for quantitative research while developing the GEP. They also hired an external researcher for an in-depth analysis of quantitative data.

**IIT** engaged with some external consultants to develop surveys and focus groups (qualitative data). In addition, they have publicised their GEP which has proven to be useful for exchanging ideas and getting feedback from other institutional actors.

**FredU** did not involve any external stakeholders during the assessment process but were involved with the Ministry of Education during the reporting stage, as guidelines from the Ministry need to be followed and the Ministry requires the University to provide them with the data. This was explained by one of the interviewees:

*“The collection of data is designed based on external needs. For example, the Ministry of Education requires all universities to collect specific types of data for every entry period. Therefore, Frederick must collect the data and be available for accreditation. During the accreditation period, all data need to be available at a departmental level, by Program of Study, and at the Institutional level. So based on the legislation the university is obliged to collect the information and have it available.”*

**TU Dublin** engaged with the HEA as their data was used for the AS application; however, this was mainly utilised to provide context for internal assessment. All HR departments in the Irish HEIs (including TU Dublin) are obliged to provide their data to the HEA, and this was fed back to the AS application. There is no evidence of external stakeholders involved for the data gathering/data collection for these two institutions (TU Dublin and FredU).

In case of **UM**, guidelines for compiling a single social report and the comparative situation of men and women are provided by the Ministry of Higher Education and the Ministry of the Civil Service. The university is also involved in an association: "Conférence Permanente des Chargées de Mission Egalité Diversité Inclusion" which is a forum for exchanging practices, collecting data and drawing up action plans. There are also a number of specific networks between universities that carry out relevant assessments.

**Other partners did not report any engagement with any** external actors during the assessment process.

#### 5.1.4. Relevance in relation to the perceived institutional inequalities or inequality groups present.

**AGH** assessment states that the university collects the data on those studying and working in the organisation differentiated by gender, but it is not collected systematically and is only disaggregated at the request of the GEP team.

According to the **BZN** evaluation, relevance is "minimally considered in the present GEP" and is limited to the gender distribution of employees within the institution. However, the focus group discussion revealed that there is openness among stakeholders to deploy relevance to a greater degree in further updates of the GEP, provided that a methodology, along with an assessment of benefits, is established. In addition, the interviewees identified relevant data that is collected separately to the GEP data collection, such as data on disability. While this information is collected on a voluntary basis, its implications for tax incentives (employer) and additional sick leave (employee) may result in considering disability as relevant for future mapping of institutional inequalities.

**FredU** reported that the university is utilising the data collection to support students, especially those who belong to disadvantaged groups or have particular needs. This is used to provide scholarships and facilitate educational procedures. However, such data is not used to the same extent for university personnel. While there is a commitment to improve all aspects of "university life", significant improvements are still needed. Furthermore, one of the interviewees noted that other relevant data for staff is collected on disability, but that this needs to be done in a more systematic way.

**IIT** reported that the measures proposed by the GEP are relevant to counter the discrimination and inequalities identified. The qualitative data confirms the critical issues identified through the quantitative data. However, the partner also noted that further feedback and analysis of the results will need to be postponed. Furthermore, one of the interviewees emphasised the importance of data on disability:

*“Aside from all the dimensions other than gender, there is reporting regarding data on disability, which concerns people hired from the protected categories. Combining this data with the survey shows that there are more people with disabilities of various types than those in the protected categories. This requires more attention and is currently not included in the GEP but is noted as qualitative data and thus the subject of inclusion actions.”*

In the assessment conducted by **KU**, interviewees pointed out the necessity of collecting data on different inequalities. For example, one of the interviewees noted that gender identity should be considered in data to be collected. Among other issues listed, menopause and menstruation were considered important but still “taboo subjects” while data on mental health, health, time spent on care responsibilities should also be measured.

**SU** reported that the issue of relevance will need to be considered by the GEP working group, which is expected to be formed in the near future.

The evaluation conducted by the **TU Dublin** team emphasised that more intersectional data should be collected. This issue was a particular feature of the focus group discussion, with an example of ethnicity given by a participant. Furthermore, data on disability was mentioned by one of the interviewees, who noted that while additional data is collected it is not included in the Athena Swan. At the same time, this interviewee noted that the AS application pulled together a variety of data, bringing it all into one place.

### 5.1.5. Institutional commitment

In **AGH**, data collection is initiated by the GEP team, but other institutions at the university are involved in this process at the request of the team. As explained elsewhere, the only institutional obstacle concerned the wage gap (privacy of salary data). The interviewees also emphasised the importance of the rector’s involvement in the GEP development. As noted by one interviewee:

*“With time the rector became convinced that this is indeed an important topic, and not only a fulfillment of EU requirements. We therefore had approval for approaching everyone at AGH for the data collection. The Centre of e-Learning facilitated the distribution of the questionnaires to the whole AGH community: the faculty, the administrative staff, and the students on each level of studies.”*

It was also noted that a budget was allocated for the data collection and the development of the GEP in the university.

The assessment of data collection practices at **BZN** revealed that the organization is “committed to not collect” any data and not ask employees to submit any data that is not mandatorily required. According to the partner, this situation is the result of an institutional assumption that employees prefer not to submit data they are not required to share, or to submit any data that are understood to be private (e.g. ethnicity, sexual orientation, religion, socioeconomic status etc.).

**FredU** reported that there is an institutional commitment and an ability to obtain the necessary data. According to the interviews and the focus groups, the main weaknesses are currently related to the unification of the Information System of the university, which will enable access, analysis, and the uniformity of the data. The need to introduce more indicators, such as nationality, into the data system was mentioned by one of the interviewees. Furthermore, training related to data collection/data curation was mentioned as as one of the areas for improvement.

According to **IIT** the data collection capacity within their organisation can be evaluated as “very good”, with all the necessary data available collected. The more complex issue was related to the data protected by specific legislation, such as sensitive data which is subject to GDPR restrictions. The partner also reported the “full support for the initiative” at the management level.

In their assessment of institutional commitment, **KU** noted that while the individual departments “did their best” in terms of data collection, participation rates could be improved if the data collection was an ongoing process with a concrete, positive impact. Gender blindness was also frequently mentioned as an obstacle affecting the data collection process, along with the lack of consciousness around gender equality. Nevertheless, the interview data shows that support was received from the acting rector at the time of the data collection as well as from the GEP committee members. Furthermore, a member of the HR team interviewed by the partner mentioned training from a research company as the main support they receive at the institutional level.

**SU** reported that the initial GEP was created and accepted at the institutional level. Future management will need to be involved with the improvements that are needed.

In the assessment conducted by the **TU Dublin** team, the interviewees and focus group participants said they feel that there was institutional commitment. Examples were given of support from the President and HR in relation to data collection. However, data collection legal restrictions in Ireland (including GDPR) may pose an obstacle/constraint to the ability to collect sufficient data on all inequalities. For example, while the HR department currently collects data on ethnic background and disability, the information is provided on a voluntary basis thus only providing partial information.

**UM** emphasised that as a public institution, the university is required to produce relevant data and make it available to the public.

### 5.1.6. Regulatory and legal context: national, sector specific and institutional

**AGH** noted that while there is no legal obligation to collect data related to gender, the Polish PESEL (national ID) system contains information about gender through the number structure.

Legal constraints at the national level were also mentioned during the focus groups, as participants noted that salary data is difficult to obtain as this type of data is legally protected. **BZN** reported that a variety of information collected on a mandatory basis for tax and statistical reporting purposes. These included: (a) name, sex, age and personal identifiers (tax number, health services number etc.) for all employees; (b) data on payments (pay, benefits and other related items); (c) data on taxes deducted. In addition, employees provide information on a voluntary basis on the following: minor children, marital status, health issues, pension status – all are then reported by the employer. However, the focus group participants also noted that there are limitations in terms of what data is obligatory to collect:

*“(…) there is a very narrow range of data that needs to be collected. All the rest may be, upon the agreement of the data holder (voluntary submission). The response rate to submitting voluntary data is very hard to estimate but the HR expects it would be low”.*

**FredU** reported that the university is obliged to report to the Ministry of Education, as well as to various committees that are responsible for the quality assurance processes of the university, which receive the guidelines and directives from the European Commission. These external committees provide the university with specific guidelines regarding what information needs to be collected. The university reports the data to the Ministry of Education and this data is further forwarded to the Statistical Services of Cyprus and published in the annual tertiary education statistical report. In the past three years, the university has also been very active in reporting and applying to different ranking organisations in relation to their tertiary education (e.g. QS ranking).

**IIT** confirmed that all data collection is conducted in full compliance with applicable laws and regulations of the state. Some data can only be requested on a voluntary basis while others require special and complex management procedures in relation to GDPR. GDPR was also mentioned in relation to the legal context and national regulations by **TU Dublin**. In **KU** there were issues related to collecting data on age as this is regarded as private and is protected by personal data protection regulations. **SU** acknowledged that all the current GEP data collection is conducted with all national and EU regulations adhered to. Finally, **NU** noted that the legal departments of the university faculties monitor the GE data, each of them using its own system. Data collection for the categories mentioned previously is obligatory by national law. The **UM** noted that the internal assessment is based on ministerial guidelines. Data, in particular data on staff and student numbers, is provided each year, as well as data on gender-based violence, sexual violence, harassment and discrimination.

### 5.1.7. Monitoring and evaluation instruments

In **AGH**, **monitoring** is carried out using quantitative tools and there is also additional data collected during training conducted by the Ombudsman for Equality (opinions of trainees). Different aspects of monitoring and evaluation were also mentioned in the interviews and focus groups. For example, one of the interviewees emphasised the importance of monitoring within their organisation:

*“We keep insisting on any new data to be disaggregated in terms of gender. We intend to monitor the indicators that we established at least once a year. There are workshops on a regular basis regarding equality issues. We’ve also introduced the Equality Ombudsperson - so there is an institutional body monitoring violations and complaints any member of AGH raises. The problems the ombudsperson deals with are a valuable tool for monitoring the situation.”*

Furthermore, focus group participants noted that gender equality analysis conducted at the university also takes such variables as “seniority, the specificity of the position held, and the amount of remuneration” into account. However, one of the interviewees also noted that while the work on recommendations is conducted on a regular basis, systematic evaluation mechanisms require more scrutiny.

**BZN** reported that monitoring is limited to updating quantitative data as required. However, focus group participants also mentioned that regular monitoring is planned (in relation to the dimensions included in the existing GEP).

**FredU** utilises tools used to monitor the collection and evaluation of the students’ information system, the Soft1 and the Financial Monitoring Information System. One of the interviewees also emphasised the need to develop systematic evaluation mechanisms.

In **IIT** data is reviewed and updated annually, as is the GEP itself. The interviewees also emphasised their commitment to data monitoring:

*“We certainly monitor trends in staff composition, by gender, by age and by origin. We are also trying to set up analyses on pay differences in pay and careers, particularly on the top roles occupied by women versus men. Which is then always the men and women dimension. I mean, everything that you kind of see on the GEP we are trying to expand it, maybe keeping an eye on just the reward policies. So how people get ahead, how long they put in, etc. We are trying to look a little bit further, however, the demographic dimensions at the end are still the same: gender, age, background. Let's say the numerical dimensions change but not the dimensions.”*

Further to that, another interviewee noted that quantitative data is also used for the specific KPIs:

*“Every 6 months we have the functions involved process the quantitative data we need to calculate the KPIs for each action. At the end of the year, we review the summaries of this quantitative data and compare the previous year's quantitative data with the closing year to see any changes. We then prepare an appropriate report and then calculate the KPIs expected in the GEP and compare them in turn with those of previous years. Here, too, we prepare a report (GEP evaluation). If there are specific areas in which to intervene, we take action; conversely, if certain actions yield rather positive results, i.e., there is success, we turn this action into a standard, which results in less effort.”*

**KU** currently has no monitoring and evaluation instruments for data collected for GEP in place. However, secondary data compiled by HR is monitored by a research company. One of the interviewees also noted that monitoring and evaluation can only be in place once a new survey is conducted, and this is still in the planning stage.

**SU** reported that monitoring and evaluation needs to be considered in the GEP working groups which is “expected to be formed soon”.

In **TU Dublin** the AS is the main monitoring instrument as it has clear timelines and must be renewed periodically. In addition, the focus group participants noted that data needs to be regularly collected by HR as it is required by the HEA. Gender pay gap analysis is also conducted. However, one of the interviewees also noted that while the AS action plans are reviewed periodically, the monitoring process is “not as institutionalised as we would like, but that is another phase – something we have to do in the future”. The same interviewee also noted that the process of data collection itself should also be evaluated.

**NU** reported that the legal departments of the university faculties monitor the GE data, each using their own system. Data collection is obligatory by law, but the university has “no unique way to collect and analyse the data [and] some of this is done “manually””.

In **UM** data within the institution is processed by the management support services, which also provides relevant information (in the forms of tables, graphs, etc.) for use by the governing body to support decision-making and strategic policies.

### 5.1.8. Sustainability

In relation to sustainability, the **AGH** team reported that repeatability is important for their institution and that the data on gender specific recruitment, promotion and career paths, is collected and analysed annually. In **BZN** sustainability is guaranteed through the mandatory nature of the data that is required to be collected (legal obligations explained in point 6). **FredU** noted that discussion related to “the need to create an Annual Report that will summarise the data collection” is currently ongoing and that the mechanisms should be in place in the next few years. According to the **IIT** data collection is deemed to be “economically viable” therefore the



partner did not envisage any particular issues regarding publication of data in the future. In **KU** there are currently plans to publish data every December. The **SU** team noted that the sustainability of the data collection process will need to be considered by the GEP working group which is expected to be formed shortly. In **TU Dublin** AS certification awards must be renewed periodically as they have an expiry date, which means that the data collection is ongoing, thus sustainability is secured through this mechanism. In **NU** the data collection is ongoing and updated once a year, however it is not published. The **UM** acknowledged in their assessment that data should be published on an annual basis, however, the university has fallen behind with this process (since 2021). Once this delay is corrected, the publication of data will be annual.

#### 5.1.9. Gaps, obstacles, and areas for improvement for inclusive data collection

All the partners identified gaps and obstacles regarding inclusive data collection, as well as potential areas for improvement. **AGH** listed the **lack of a centralised unit** that would collect all quantitative data, lack of information on **non-binary people** and a lack of tools that would help in **intersectional analysis** as problems they encounter. Time and budgetary constraints were also mentioned during the expert interviews. In addition, cultural issues were also raised by those involved in the GEP. One of the interviewees, for example, explicitly listed the “culture of [the] technical university”. This was highlighted in the data collected through interviews conducted for the purpose of the GEP:

*“Many interviewees were open to issues of inequalities regarding well-being or combining family and work roles, but they reproduced stereotypes about engineers as men and Science and Technology studies as being also the masculine domain. There was also a significant proportion of conservative voices, that some leftist ideology is being introduced and they heralded the end of AGH”.*

While the political situation was perceived as an obstacle (particularly in terms of the former government being “against equality”), institutional obstacles also occurred on a more practical level. For example, the focus group discussion revealed difficulties in obtaining salary data (private information) and resistance within the organisation to collect data on gender categories other than ‘man’ and ‘woman’.

**BZN** identified **trust as a major issue**. More specifically, the partners’ evaluation stated that: “employees do not trust the employer to manage and use the data fully responsibly, therefore, using this assumption, BZN only manages and uses minimal data, i.e. those required by law”. As reported by this partner, this is “the viewpoint held by the management, and it is not likely to change any time soon.”

**FredU** reported that, according to the focus group and the interviews, the main obstacles encountered by those who gather data is “the need for urgent **improvement of the infrastructure**

(information system), the need to **further train the staff** for the data collection and the analysis, and [the need to] **make the data more centralised**". During the focus group discussion, it was also noted that while they have not faced any institutional resistance towards gathering data for specific groups, there is a need for more training geared towards a better understanding of why some data is needed and how the data is required.

According to the analysis conducted by **KU** the university employees are "too busy to answer survey questions and e-mails, and this affects data collection process and quality". The other obstacles include a **lack of understanding of the reasons for asking questions related to gender equality**, as well as "**gender blindness and unconsciousness**". In addition, as reported by the partner: "**sociocultural concerns** sometimes create obstacles for data collection because it may lengthen the design process or even change the way questions asked".

**IIT** noted in their report that "everything is improvable". For example, **more data could be collected**, and incentives could be sought to compile voluntary data. The **process of automating data collection to reduce manual work**, and to make it easier to visualise and use the available data, was deemed to be particularly important. Finally, it was noted that **some solutions could be considered to manage and collect data protected by GDPR**. In fact, GDPR was considered as an important obstacle by one of the expert interviewees:

*"The main obstacle is the fact that much information has never been collected. Also, because of the GDPR [General Data Protection Regulation], one cannot easily collect data regarding sexual orientation, gender identity, child data. So, the IIT has difficulty in collecting these data. Thus, the analysis is more difficult because the data is incomplete."*

The main issues identified by **SU** include a **lack of dedicated data collection for the GEP**, and that there are **no external stakeholders involved in the creation of the GEP**. It was also noted that the **working group on the GEP is yet to be formed in the new year** (in relation to the new university management elected in November 2023). Also, there are currently **no mechanisms for monitoring and evaluation in place**.

In the analysis conducted by **TU Dublin**, several areas were noted as needing improvement. These included: raising awareness of EDI principles throughout the institution, a more intersectional approach to data collection (e.g., collecting data around race equity, disability, and, to some extent, sexual identity), continuous data collection (as opposed to 'one-off' collections for the purpose of the AS application), further exploration of contextual issues related to specific indicators, and the inclusion of a student survey to allow for issues emerging among this group, for a more holistic view. Having coherent, unified and consistent data across the university was also mentioned as an area to be improved upon. Time constraints, as well as ways of engaging with external stakeholders, were also noted as obstacles.

In **NU**, forming **unified procedures for data** collection and adding the **possibility of gathering data on additional groups** to the procedures of the University, were identified as possible areas for improvement. These measures will **allow the data to be comparable and organised in the same way** across the university.

In **UM**, the main issue identified was related to the delays in collecting data which takes more accurate cross-tabulations on gender, age, seniority, nationality, disability, marital status etc into consideration. In addition, there were gaps in recording some of the data and thus individual departments need to be encouraged to collect and share this information. A longitudinal perspective was also identified as needed so as to observe institutional change.

#### 5.1.10. Data collection practices: overall assessment

The overall comparative analysis of the data collection practices shows a rather versatile picture among the participating organisations. In relation to inclusiveness, most of the partners focused almost exclusively on gender and only a few collected data on inequalities specifically for the purpose of developing their GEPs. IIT was the only institution that aimed at analysing multiple inequalities while others were more targeted, with the example of TU Dublin (gender identity, race and ethnicity) or AGH (sexual orientation). Several partners reported that there is data on other inequalities available for analysis, however this data is not considered for the existing GEP. This can possibly provide a platform to leverage actions on inclusivity and engage with other vulnerable groups. Quite importantly though, other factors need to be taken into account, such as national regulations or institutional commitment, as both can act either as a facilitator or an obstacle for a more comprehensive analysis of internal inequalities. Thus, the former may allow for more data to be available if there is mandatory data collection for administration purposes (with Hungary being an example of such) or be a challenge, particularly in relation to the GDPR and national legislation related to privacy (for example Ireland, where the data on race and ethnicity is provided on a voluntary basis). Institutional commitment is also crucial as the process of data collection and analysis requires dedicated resources. This may prove problematic for some of the implementing partners who could be characterised (at least to date) as having a ‘weak’ institutional commitment – with BZN and SU as examples. Finally, there were common obstacles identified during this phase of the NEXUS project and these were related, on one hand, to the cultural and institutional understanding of the importance of inclusivity, and, on the other, to the lack of centralised and unified procedures for data collection and analysis, that would allow comprehensive and comparable assessment of the existing inequalities.

#### 5.2. GEP evaluations

This analysis is based on the self-assessment forms completed by each individual partner. These forms were requested during the NEXUS proposal stage, and subsequently updated in December 2023. All participating institutions followed the same template, which consisted of an internal assessment of inequalities, as well as a short description of their current GEP. Regarding the latter, overall GEP requirements (e.g., publication, dedicated resources, data collection and monitoring, and training) were evaluated (yes/no answers), followed by the relevant domains. Partners were also asked to describe their approach to intersectionality, assess the levels of institutional

commitment, and elaborate on the follow-up measures foreseen to ensure that inclusive measures developed within the project will be sustainable after the end of NEXUS.

### 5.2.1. Gender equality plans: summary of required elements

Table 5.4: GEP summary of required elements

Partner	AGH	BZN	FredU	IIT	KU	SU	TU Dublin	NU	UM
Publication	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Dedicated resources	in progress	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Data collection and monitoring	in progress	Yes	Yes	Yes	In progress	Yes	Yes/In progress	In progress	Yes
Training	planned	Planned	Yes	Yes/IP	In progress	Yes	In progress	Planned	Yes

### 5.2.2. Intersectionality in the GEPs

**AGH** reported that inequalities arising within their institution include **sexual orientation and age**. In particular, the treatment of non-heteronormative people was highlighted by the partner. Their analysis shows that students have been experiencing inappropriate behaviours related to their psychosexual orientation/identification, or discriminatory behaviours of a homophobic and transphobic nature.

**BZN** reported that their institutional GEP is not intersectional, however the non-discrimination charter of the institution outlines the following dimensions: gender, age, race, ethnicity, health, and disability. Data is not collected on these categories though, with the exception of health and disability status (voluntary reporting), which has however, not been used for the purpose of the GEP.

In **FredU**, intersectionality data regarding citizenship/nationality, age and disability are recorded for both students and staff upon registration or during hiring. Sexual orientation and gender identity are not included, while religion/belief is no longer put on record. Intersectionality is briefly mentioned in the university code of conduct; however, no actions are implemented in the GEP to address intersectional issues.

**IIT** reported that they have conducted a mixed methods internal analysis to detect differences among staff which had not been mapped previously. This allows for examining intersectional inequalities in relation to possible interventions. Firstly, inequalities addressed included sex and/or gender, social class/socioeconomic background, age, disability and nationality. For privacy reasons, data on sexual orientation, religious belief and ethnicity was not used. Secondly, a quantitative-qualitative study was conducted which consisted of a survey, focus groups and individual interviews which explored beliefs, perceptions, attitudes and expectations on diversity in IIT. The results of the study were distributed among staff and top management. The GEP aims

to intervene on most of the identified issues through various types of interventions and specifically designed measures.

**KU** noted that several aspects of intersectionality needed to be addressed in their institution, particularly in relation to the intersection between gender and age (issues affecting young female academics) as well as discrimination based on sexual orientation. This partner also noted that there have been no specific identified issues associated with either race or disability and emphasised that the disability office does prioritise intersectional equality.

In **SU**, intersectionality is not currently taken into account. As noted by the partner, there are national rules related to discrimination, for example, treatment of persons with disabilities which are followed by SU. However, no specific inclusive measures in their GEP taking intersectionality into account have been developed.

In **TU Dublin**, the issue of diversity is addressed in the Strategic Intent 2030 implementation framework. The organisation also has the Race Equity Action Plan, approved in 2021 which contains several targeted actions to encourage staff diversity (e.g., include demonstration of commitment to race equality in applications for decision-making positions, and a commitment to set up a Traveller, Roma, Black, and Minority Ethnic staff network). Furthermore, the new Recruitment Selection and Appointment Policy has been established with the aim of ensuring equal opportunity for all job applications (with training on unconscious bias mandatory for all members of selection boards). The AS action plan also contains a section on Building an Inclusive Culture, as well as a section on Building Fluency in Intersectional Approaches to EDI – with an emphasis on Gender Expression and Gender Identity, and on Race Equality. Commitment to future intersectional data collection is also present in the institution, with the aim to develop capacity for prioritising race/ethnicity, disability, socio-economic group, gender identity and sexual identity for staff.

**NU** noted that intersectionality is not tackled within their faculty and remains a silent issue. For example, race and nationality are not mentioned. According to the partner's evaluation, this is because neither the faculty nor the university as a whole, are multi-ethnic environments. The institution provides opportunities for students from vulnerable groups (such as Roma and other minorities, as well as persons with disabilities) but despite these measures being in place, enrolment among these groups remains low. Furthermore, sexual orientation is not discussed.

In **UM**, a disability plan was set up, with a large focus on discrimination. This plan is envisaged as a potential support for the GEP with regards to tackling differences and discriminations which are intersecting between gender and disability. An Inclusion and Anti-Discrimination Officer was also appointed at the university level. This position is focused on awareness raising about inclusion and to ensure that this is respected in the institution. The Disability Office also acts as a resource for anticipating or dealing with individual situations so as to secure successful integration and to also deal with cases of discrimination, particularly related to racism, antisemitism, homophobia and transphobia, in addition to cases linked with disability.

### 5.2.3. Domains addressed in the existing GEPs

Table 5.5. Domains addressed in current GEPs

Partner	AGH	BZN	FredU	IIT	KU	SU	TU Dublin	NU	UM
Work-life balance and organisational culture	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
Leadership and decision making	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Recruitment and career progression	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Research and teaching content	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes
Measures against gender-based violence including sexual harassment	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes

The majority of the partners’ current GEPs address all five relevant domains, with exception of **FredU, TU Dublin and NU**. The GEP developed in **FredU** does not address recruitment and career progression and research and teaching content domains. **TU Dublin’s** GEP does not contain actions related to research and teaching content, while measures against gender-based violence are included predominantly under the domains of work-life balance and organisational culture, and recruitment and career progression. The organisation also has a separate “Ending Sexual Violence and Harassment at TU Dublin” action plan (2021-2024), which was launched in 2020. **NU** reported that their GEP does not tackle work life balance and gender-based violence. **IIT** reported that their institution promotes balance between work and family/personal life through specific GEP actions on mental well-being and parental support, amongst others. In relation to recruitment and career progression, IIT’s GEP contains actions to improve gender equality for researchers and PhD students. This GEP also contains actions to promote gender awareness in the research process through internal training and seminars on equality, and on gender and intersectionality in research. Finally, IIT is currently in the process of designing policies on discrimination and gender-based violence. The GEP developed at **AGH** contains five key areas of actions, which are related to the relevant domains, and include access to career paths, supporting balance between family and work (including caring roles), increasing diversity in leadership and decision making, ensuring that the university is a safe space for work and study, and implementing measures against sexual harassment and discrimination. **TU Dublin’s** GEP, which is partially included in the Athena Swan Action Plan, has a number of actions and targets for the period 2022-2025. Some examples include

achieving gender equality at the senior level, implementing an equitable recruitment process, implementing career analysis and supports as well as research profile supports, conducting gender pay gap audits, embedding Athena Swan with regards to organisational culture and work-life balance, and building an inclusive culture throughout the university. Intersectional approaches to EDI are included in the plan and the university also holds a commitment to further intersectional analysis and more targeted actions to be enabled.

#### 5.2.4. Level of commitment to change at institutional level

**AGH** reported that institutional change requires the involvement of leaders at the central level and that the GEP team was established by their rector. The GEP team operates within the Faculty of Humanities and thus involves the Dean of the faculty, as well as other central and basic institutional units, administration and research and teaching units. The units specifically involved in the implementation of the GEP policy are as follows: the Rector's Office, the University Student Government Council, the GEP Team, the AGH Faculty of Humanities, the AGH Project Service Centre, the Student Ombudsman.

For the **BZN** team, there is institutional commitment to implement the current GEP, with the HR department being responsible for this task. There is also institutional commitment to investigate the possibilities for improving the existing GEP, aided by the work within the NEXUS project. This is the responsibility of the International Department. Middle and top-level management are mobilised by HR for the implementation of the plan. Follow-ups and changes to the GEP are presented by the HR to the top management for consultation and approval.

In **FredU**, the main agent for regulating gender equality is the President of the Council of the University. Currently, the first intersectional GEP (2021-2025) is being implemented and the level of institutional commitment as high. However, areas for improvement were also identified, with an emphasis on the need to design a comprehensive strategy to ensure the continuous involvement of middle and top management (besides the President of the Council).

**The IIT** team assessed the level of institutional involvement at their organisation as 'elevated'. The Executive Committee approved an "extraordinary" budget for financing a project regarding the implementation of GEP actions, the introduction of a mentoring program, coaching support and career advice service, the introduction of psychological support for those in difficulties or transition, support for those returning from parental leave, improvement of work-life balance, a palimpsest of actions focused on improving the gender equality among students or disadvantaged groups, and a training program on diversity and inclusion.

In **TU Dublin**, institutional commitment is included in the strategic plan, as the university Strategic Objective 2030 under the "People" pillar states that TU Dublin is to be recognised as an exemplar in equality, diversity and inclusion" (EDI) where people are proud to be part of a connected community and their talents, aptitude and agility will create real impact on the global stage, and, the milestone is set at: "Achievement of staff and student profiles in line with our EDI ambition, including attainment of the Athena Swan award and 20% international staff cohort; and implementation of a staff charter that supports the passion and commitment to our people".

Advancing gender equality is also a criterion for appointment to HoS and unit managers. Accountability for delivery of gender equality policies, practices, and initiatives is a responsibility of all managers at all levels. TU Dublin has a Director for EDI employed full-time, who is a member of the senior management team. The Director of EDI reports directly to the President on EDI matters and represents the University externally on same. The Directorate has a budget appropriate for enabling leadership capacity across the University.

**SU** reported that the institution recently appointed a Vice Rector responsible for implementation of the GEP. The organisation is also currently undergoing the process of establishing a dedicated working group. The Dean of the Faculty of Philosophy is engaged in this action.

**NU** assessment reported “basic” levels of institutional commitment to change. The main actors for the change are some “conscientious” managers of COME faculties who themselves are introducing some small changes, the faculty of law for example. Partners also noted that there is no strategy for connecting middle and top management to ensure their involvement.

**UM** has established a mission officer for gender equality and have created a unit against sexist and sexual violence thus indicating institutional commitment. Furthermore, their Scientific and Culture Unit (part of the Research Direction) has been involved in various gender events and actions, in particular related to removing difficulties for young women to engage with STEM courses and to increase the number of women in laboratories which are traditionally male-oriented spaces. UM is also a partner of the Gender Institute ([www.institut-du-genre.fr](http://www.institut-du-genre.fr)) which is an organisation that provides funding, international mobility and awards to develop research on gender. However, no proposals have been submitted to date. Follow-up measures

### 5.2.5. Current GEPs: overall assessment

As noted earlier, for the majority of the partners the introduction of GEPs has been a relatively recent process. Despite the novel character of the implementation of these action plans, most partners reported strong institutional commitment, however some geographical patterns can be observed here, with institutions located in such countries as Ireland, Italy and Cyprus showing a stronger understanding for the need of GEP implementation. Furthermore, the intersectionality of GEPs was overall weak with some measures already in place but mostly focusing on gender alone. As it will be further discussed, a more holistic approach will be necessary for making the GEPs more inclusive.

### 5.3. Ways forward

Our analysis practices of data collection among partners, and their current GEPs demonstrates that while some of them show an increase in their understanding of the need for more inclusive actions, there are still some gaps and areas for improvement. Most of the GEPs focused on gender only and this is also transparent in terms of their data collection. It is important to emphasise that some organisations collect data on inequalities other than gender, yet very rarely these are utilised for the purposes of developing more inclusive actions. The reverse is also sometimes the case, where there is a need identified (for example, to address inequalities related to race and ethnicity, disability or sexual orientation) potential actions are not yet grounded in coherent and conclusive data. The links between in-depth knowledge of the specific lived experience of



vulnerable groups, and the ways forward, thus need to be highlighted. An intersectional approach to data collection is thus the first necessary step to be undertaken in order to develop more inclusive GEPs and to ensure that the needs of all involved are appropriately addressed. Such data may be gathered from existing data sets collected within the institutions, or from outside organisations; however, in most cases, additional data needs to be collected specifically for the need of advancing current GEPs. The following section will provide an overview of the issues that need to be considered when undertaking intersectional approaches to data collection and will outline the necessary steps to be taken during the data collection process.

## 6. Methodology for Inclusive Data Collection

This section considers the ways in which data collection for more inclusive GEP development should be conducted. It considers the existing international literature, as well as policies and good practices, and also utilises the information from the analysis of implementing partners assessment of their current data collection practices. First, intersectionality will be explored, with a particular focus on step-by-step methodological guidelines, including methods to collect data, recruitment of participants and the subsequent analysis. Two other dimensions at the core of the NEXUS project, intersectoriality and geographical context will also be elaborated upon. Finally, the section provides a summary of the phases and steps to be undertaken (Figure 6.1) along with some questions to be considered when evaluating existing practices and preparing the new procedures for the GEPs data collection.

### 6.1. Intersectionality and inclusive data collection for GEPs

As outlined in the introduction to this document, intersectionality is a key approach to consider when collecting data on gender equality and inclusivity in RPOs as it enables the identification of the unique needs of individuals from different backgrounds and of different personal attributes/identities. Different ‘vectors’, or dimensions of inequality need to be considered when undertaking this approach, and these will be further discussed in this document. Such dimensions (in addition to sex/gender) include, but are not limited to age, sexual orientation and gender identity, race and ethnicity, having a disability, religion, and socio-economic status and background. In sum, this is an approach that examines how different axes of inequality overlap, affecting individuals and groups in unique ways. In this sense, it differentiates itself from mere “additive approaches” where, for example, being a woman, black, disabled and homosexual is seen in terms of “additive discrimination” but rather considers multiple inequalities as overlapping and interacting (Abrams et al., 2020; Bentley et al., 2023; Nichols & Stahl, 2019).

Considering the benefits of intersectional approaches discussed in the international literature and included in relevant policies and solutions from various countries, it is recommended that multiple inequalities need to be considered when collecting and analysing data for the GEPs and related policies. Furthermore, the extent and scope of intersectionality needs to be monitored and regularly revisited by taking the national and institutional challenges and needs into account.

## 6.2. Collecting data for enhancing inclusivity in RPOs: recommended methodological approaches for adapting intersectionality

If an intersectional approach for GEPs is fully adopted, then the data collection should be a distinctive phase of the GEP process. With adequate emphasis and resources allocated to this phase, inclusive data collection will allow illumination of complexities of inequalities and the experiences of discrimination and will enhance the design of more comprehensive solutions (Abrams et al., 2020, p. 4).

For adequate and robust intersectional collection of data, a careful methodological design needs to be undertaken. Data collection methods depend on the aim, the target group, the availability of data, as well as the expected outcomes of the study. Initially, data collection is expected to measure, from an intersectional perspective, the different **needs** of individuals and groups in the institution to determine corresponding policy action, and an **impact evaluation** should be integrated to assess the outcomes of implementations of actions targeting these groups.

Principles of data collection process, which needs to be:

- Regular and sustainable to monitor change and acquire up-to-date information
- Ethical to protect the privacy and other rights of those who are involved
- Gender-sensitive and considerate of different intersectional inequalities for ensuring inclusivity

**Regarding different ways of data gathering, mixed methods are** often identified as the most appropriate approach for collecting intersectional data. Methodological triangulation, defined as mixing data or methods to allow for diverse perspectives in the analysis (Olsen, 2004), should also be used, with multiple methods of data collection interacting. Examples of mixed methods include combining quantitative data such as surveys, and qualitative data, such as interviews and focus groups, both allowing for a deeper understanding of the situation (Olsen & Haralambos, 2004). Using the combination of quantitative and qualitative methods of inquiry allows for gaining broader as well as deeper perspective on intersecting inequalities. While quantitative data enables an understanding of inequalities on a structural level, qualitative methods can be particularly useful to gain more insights on lived experiences and the ways in which different groups of people are affected by inequalities, thus enabling better ways of addressing their needs (Abrams, 2020; Christoffersen, 2017).

Several aspects need to be considered when adapting mixed methods for intersectional data collection. First, data collection techniques must be decided on, with all the benefits of triangulation considered. Second, for quantitative methods (collection of primary data and of existing secondary data), there is a need to understand that categories are contextual, and influenced by political interests, the availability of statistical data, and current knowledge – among other factors. Migrants as a category can be an example here, as they may consist of groups of different people, depending on the host country (EIGE, 2020). Furthermore, the timing of the data

collection should be carefully planned, as mixed methods can be conducted through sequential or through concurrent study design (Creswell, 2003). Longitudinal aspects of mixed methods data collection should also be considered (Harper, 2011) and this involves collecting data at multiple points in time, thus allowing not only for triangulation, but also for observing complex changes (Grace, 2014), as well as for possible vertical and horizontal mobilities.

Based on the available international literature, and also on practical experiences recorded through the research conducted during the NEXUS project, the following are a range of recommended methods for data collection in HEI and RPO organisational settings. These recommendations particularly take the need for implementing a combined and triangulated mixed-methods approach into account.

- **Rapid evidence assessment:** An initial evaluation of the existing information through a targeted and structured review of resources is an important step for data collection. Data collection about missing groups should also be considered in this step.
- **Desk research:** An extensive assessment of the practices implemented within HE and R&D institutions and related reports/documents to provide an understanding of what has already been done on the topic, both content-wise and from a methodological point of view
- **Content analysis:** This method could help to identify the issues in the research and teaching content in HEI settings, and research context in the case of R&I organisations, alongside the content of the institutional rules and regulations concerning gender (in)equality.
- **Time use diaries:** Specially to examine how time is spent by women and men academics through an intersectional lens, time use diaries are an efficient methodology to employ.
- **Questionnaires:** As a quantitative method, questionnaires could be administered to gather representative and generalizable data on an institutional level if undertaken through random sampling. While questionnaires majorly consist of close-ended questions, occasional open-ended questions could be incorporated. This type of data could be collected cross-sectionally and used for descriptive purposes, but collecting panel data is also crucial for being able to make causal inferences.
- **Secondary statistical data:** Existing institutional and national-level statistical data could be helpful to understand mid and macro-level gender equality patterns and create a strong basis for further research. In accordance, data analysis tools need to be kept updated and an adequate amount of funding should be provided for the purchase of these tools (e.g. software such as Stata, Maxqda, R etc.) for an efficient analysis and evaluation process.
- **Focus groups:** Focus group create an environment in which thoughts and experiences are shared, thus, contributing to problem identification as well as problem solving processes through data.
- **In-depth interviews:** In-depth interviews help us to understand the needs, perceptions, and expectations of the respondents regarding the specific topic studied in an expanded way.

**Next, the ‘vectors’ for subsequent analysis need to be considered.** Several points have been noted as worth considering by researchers when planning for the data collection phase. For example, a recent review of existing studies found that gender is often used as a primary ‘vector’

and is then combined with other inequalities to produce intersectional positions (Nichols & Stahl, 2019). The relevant literature also emphasises that there is a need to move beyond additive thinking about inequalities and instead aim at understanding how multiple inequalities interact and thus impact individuals or groups in various ways. For example, one should not explore being a ‘woman and Asian’ as separate lines of inequalities simply added together, but ‘living through Asian womanhood’ instead (Bentley et al., 2023; Nichols & Stahl, 2019) and that there is a need to move away from the “big three”: race/ethnicity, class and gender (Anthias, 2013). Furthermore, multiple characteristics that individuals have cannot be siloed or deemed exclusive to each other (Thomas et al., 2021). Quite the opposite, inequalities such as race, class or gender (among others) do not operate as distinct categories, but ‘are lived conjointly’ - thus intersectionality need to examine the interaction between these inequality categories (Nichols & Stahl, 2019). Different vectors are proposed to be included in the analysis, such as: gender, socio-economic status, (high, middle, low); racial and ethnic identities, (dis)abilities; but also, others, such as: body size, drug/alcohol addiction, marital status, parental status and political beliefs (IGLYO, 2014).

**For deciding on which inequalities to focus on, the following two points need to be carefully considered:**

- **Extensive training** on the in-depth understanding of intersectionality, and on intersectional approach to data should be provided by expert(s) to the team members who are involved in data collection and data analysis.
- Throughout all **GEAR tool steps**, which can be sortable as understanding the institution’s needs to determine scope and purpose, analyzing and assessing the status quo regarding gender equality, setting up the GEP, implementing the GEP, monitoring and evaluating the GEP, intersectionality need to be considered as overlapping rather than simply ‘added’ categories. To achieve the former, it is crucial to acknowledge that regardless of the methodology employed, desk research and initial evaluation of the literature, by being context-sensitive, is key.

**Recruitment of participants constitutes another important aspect of the intersectional approach to data collection.** In this regard, some sources recommend a fully participatory design of any intersectional study (Abrams et al., 2020; Gilmore-Bykovskyi, 2022). Whether or not such a design is adopted, there are several points that need to be considered in relation to the study participants. First, in intersectional approaches, there is a need to ensure diversity among research participants and to deploy various benchmarks to ensure an appropriate mix. This includes, for example: current composition across specific ethnicities, current composition across all other equality areas intersecting with ethnicity, or ethnic composition beyond the institutional setting, e.g. the composition of the local areas (Christoffersen, 2017). In addition to different categories of individuals, the impact of inequality should also be considered during the sampling process, along with commonalities possibly existing across multiple identities of participants (Cole, 2009).

Reflexivity is key when it comes to the recruitment process. The relevant literature calls for a necessity to familiarise oneself with the most important characteristics of participants and, while shared identity is not always possible in the context of HEI and RPOs the differences in should be acknowledged (Christoffersen, 2017). In general, the literature on intersectional approaches to data collection often emphasises the need for participatory research methods. This includes collaboration on research questions (IDC, 2021), piloting interview guides (Padgett, 2016) and active collaboration with the community of interest in relation to the data collection sites, timings, and the compensation for participation (Powell & Gross, 2018).

Collaborating with communities of interest in relation to interview guides has been noted to have a positive impact on reducing power imbalances in the research process (Abrams, 2020). Furthermore, community-based participatory research is also recognised as particularly useful as it promotes an intersectional approach and allows for gaining an understanding of the experiences within the community context rather than as a comparison to the dominant norms (Weber & Parra-Medina, 2003; Abrams, et al., 2020). There could be various challenges such as low response rate in questionnaires, lack of potential respondents' cooperation or motivation to attend different data collection processes such as in-depth interviews or focus group meetings, and some of these issues could be related to a lack of intersectionality. While the underlying reasons for these obstacles need to be understood through the right questions:

- Do the respondents have privacy concerns (and are there any specific groups carrying this concern)?
- Are they overworking and is there no time is available for participation in research activities (and are there any specific groups challenged with this problem)?
- Is there an awareness issue concerning the research topic (and are there any specific groups with an apparent lack of awareness concerning the issue)?
- Do they feel unsafe in relation to pressure from the administration (and are there any specific groups with a stronger feeling of unsafety)?
- For achieving diversity to challenge intersectional inequalities: Are there any groups who are overrepresented or underrepresented among the respondents? What could be the underlying reasons in the particular setting for this specific representation pattern? Could the issue be related to the failure to present the aim and background of the study to certain groups or overall lack of representation of any group?

The answers to these questions also form a significant part of data collection in an intersectional way, and corresponding strategies and coping mechanisms should be generated. In addition, the use of participatory methods during the data collection and data analysis stages is highly important.

**An intersectional approach to data should also be applied to the analysis stage.** As outlined in the Australian GEAP guidelines, an intersectional approach should be adopted for both quantitative and qualitative analysis. In particular, disaggregated quantitative data should be treated with scrutiny, as small sizes or false assumptions may lead to misinterpretation or incorrect conclusions, thus qualitative data should also be collected to supplement the quantitative analysis (Commission for Gender Equality, 2022). In this context, the existing literature also emphasises the need for going beyond the commonalities among themes, but also to recognise the unique lived experiences linked with intersecting inequalities – and this is best achieved through: obtaining data that is adequately disaggregated, being aware of the context, and allowing communities generating their own data (IDC, 2021). Data should also be put into a context as there is a need to be “aware of the historical and contemporary structuring of inequalities in wider society, and, most importantly, among staff and students at your institution or college” (Christoffersen, 2017). Some recommendations also advise the analysis to be divided into steps, with first one considering social categories or concrete social relations, followed by the question of which “societal arenas” (contexts) are deemed relevant and, finally, aiming to establish which historical processes may be of the interest in the chosen context (Anthias, 2013). The analysis should also explore the complexities of different intersecting inequalities as some studies suggest “positive” impacts of certain characteristics, such as ethnic minority or migration background (Berrington et al., 2016). Other frameworks may also be deployed, with examples including multi-racial feminist discourse (Ramirez, 2013), code switching (Bailey Fakhoury & Frieson, 2014) or positionality (Hearn, 2012). Furthermore, marginalisation should not be considered as a characteristic of a fixed group of people and/or identity as certain characteristics do not imply that the person is disadvantaged (IDC, 2021). Finally, it is also important not only to address those “left behind” but also to address the concentration of power, income and wealth at the top to break links between economic and social exclusion and decision-making powers (UNCD, 2018).

### 6.3. Intersectoriality

Adopting an intersectional approach also requires outreach and consultation with key groups and their organizations, as well as being proactive in terms of initiating the conversation when opinions of those with multiple identities/inequalities are considered (IGLYO, 2014).

Engaging and collaborating with stakeholders is argued to be necessary for intersectional approaches to data, and this includes engaging with marginalised groups, but also other organisations with similar goals and academics/practitioners with similar goals – thus a mapping exercise needs to be conducted as one of the first steps (IDC, 2021). As will be further discussed, institutional commitment to intersectional data collection thus often requires a participatory approach in research design, which fully and thoroughly considers the voice and the perspective of those affected by inequalities.

In relation to enhancing inclusiveness, the most recent ERA communications also emphasise the need for intersectoriality, particularly in the context of STEM female researchers and their circulation/transfer between academia and industrial R&D, with a further necessity to address gender gaps throughout entire pipelines (Sangiuliano & Cescon, 2021)). In a wider context, the so-called ‘innovation ecosystems’ can provide a useful conceptualisation for intersectoriality

(Grandstrand & Holgersson, 2019), with various stakeholders as important actors within these ecosystems, including industry, academia, public bodies, and others (media, trade organisations etc.) (Komorowski, 2019).

Thus, it is recommended to consider intersectorality as important to account for during the data collection processes as well as during the analysis of institutional practices. In this case, a longitudinal approach may be quite beneficial, as it allows for tracing and following inter-sectoral mobility between institutions and sectors. Furthermore, stronger cooperation between different organisations would be required. There are various dimensions of possible collaborations between different sectors when data is collected or used for analysis:

- Secondary data obtained from public entities concerning gender equality patterns at the national level is beneficial for making comparisons and setting goals.
- Funding provided by private institutions or public entities is highly beneficial for data collection processes.
- Collecting data on the collaborations between HEI, RPOs and other stakeholders is an important type of measurement regarding the impact of intersectorality
- Receiving support from other institutions (research companies, public institutions such as national statistics offices etc.) during data collection processes is expected to generate a more versatile methodological approach.
- Data collection practices in other sectors could be adopted for different HEI/RPOs settings.

#### 6.4. Obstacles and times of crises

The relevant literature points out that there may be various challenges and obstacles to the implementation of the intersectional approach to data collection. First, there may be resistance at the institutional level as intersectionality can be a highly political issue (Ledbetter, 2018). There can also be competing interests between different inequality groups, with an example of feminists who may fear that gender, which they perceive as the ‘core’ inequality becoming lost, being discussed in the literature (Enderstein, 2019). To avoid such concerns, it has been recommended to adopt a ‘gender+’ approach to inclusivity – which provides the advantage of an intersectional approach to inequalities with adequate emphasis on gender inequalities, as gender remains central to such an inclusive approach (Enderstein, 2019). Furthermore, there is also a danger of intersectionality becoming a ‘tick box’ exercise (e.g., Anthias, 2013) which also needs to be addressed at the instructional and structural level. Other constraints include not being able to incorporate “all intersectionality core ideas” into one single study, due to the budget constraints, data availability or gaps in expertise (Agénor, 2020) and these limitations need to be acknowledged. Some sources also note the potential fragmentation of systems, with Ireland given



as an example of a case with no universal overview of data capture and with multiple data sets that are often not combined, in the case of the existing data (Donnelly et al., 2022).

During data collection processes, there could potentially be varying difficulties, obstacles, and data might need to be collected during times of crisis. In addition, the ethical aspect alongside issues surrounding reliability and validity are crucial elements - as it is key to use the right method and measurements for the expected outcome, by considering the target group and their needs and sensitivities. In these aspects, there are questions that need to be asked. While collecting data, starting from the research design stage, how are intersectionalities and intersectional inequalities considered during times of crises such as COVID-19, political conflict, natural disasters etc.? Data collection during times of crises requires planning and organizing beforehand, and certain strategies should be created before facing such unprecedented times. Such as how data could be collected (e.g. online/face-to-face) and through which strategies (how to motivate the respondents in such conditions etc.) this could be done. Motivating participation could be achieved through various steps (by carefully acknowledging contextual obstacles) such as providing incentives when necessary, explaining the aim of the study and how it will benefit the target group (respondents), brief informative meetings/trainings to raise awareness on the topic of the study, and dissemination of regular newsletters containing direct, relevant, and to the point knowledge (preferably supported by visuals, including descriptive statistical information if applicable, and mainly using key points, keywords etc.) on the matter of particular interest. The inclusion aspect also needs to be incorporated in terms of informing participants involved in the research conducted as well as all employees regarding the results of the analyses of the data collected to foster further cooperation in times of crisis and beyond.

## 6.5. Cultural and Geographical Differences

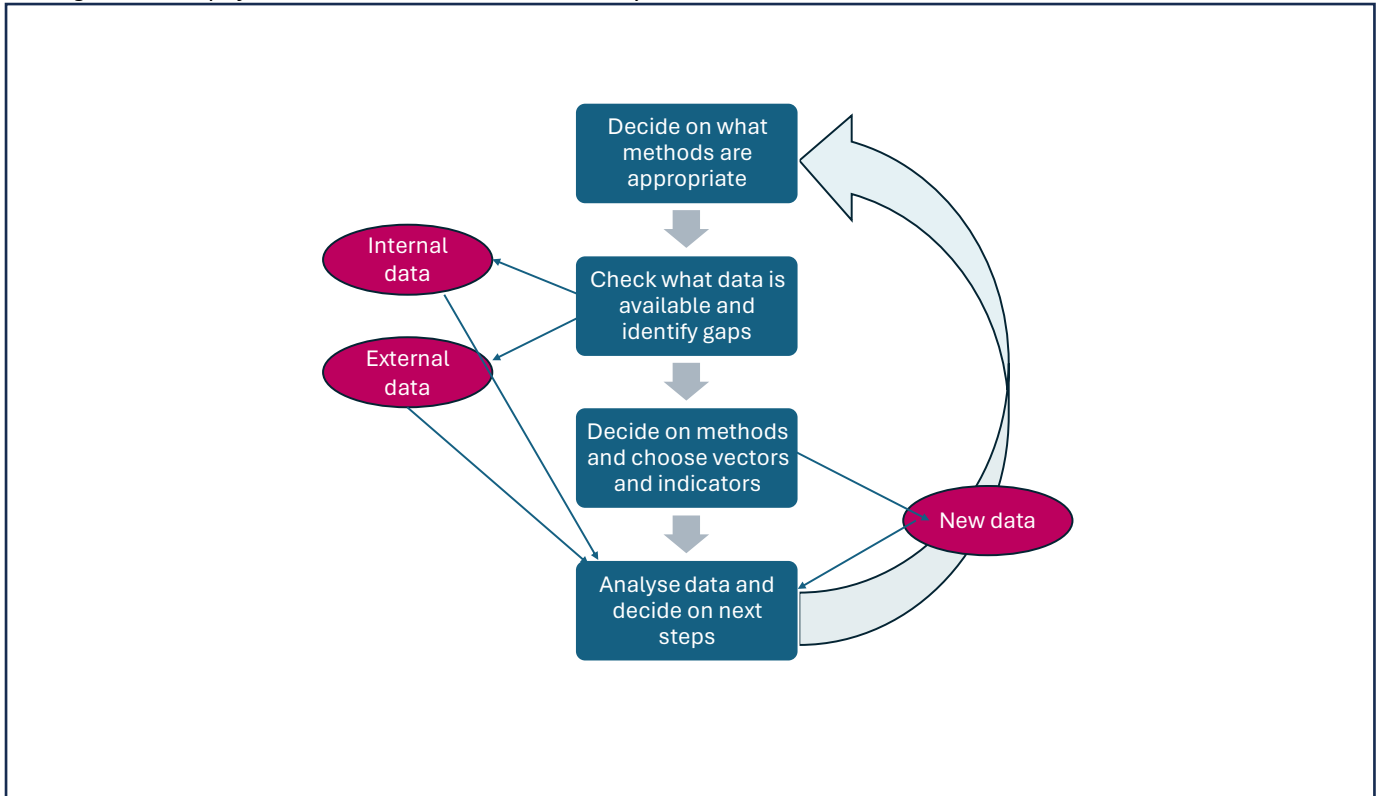
While intersectionality takes individual or group differences into account, there are also cultural and geographical differences between national and local contexts that need to be considered, particularly when conducting comparative studies. Quite importantly, inclusive data collection strategies for future improvement of actions need to be developed with reference to the local and national policies and to legislative frameworks. Geographical sensitivity also needs to examine possible resistances to change which may derive from cultural and structural specificities of the institution and its geographical context. Therefore, the following issues related to this should be recommended:

- Primary obstacles regarding gender inequality in HEI and RPOs may vary in different countries, there may also be regional differences within countries
- Certain cultural sensitivities could make data collection on specific issues particularly challenging in some settings.
- There could be context-specific differences such as the presence of private vs. public universities, while this could not be an issue in others.
- Different legal frameworks should be considered both for and during data collection processes.
- During data collection processes, it is advised to take the policy context into consideration to understand the varying impact of relevant policies on different groups.
- Socio-political obstacles could exist in some countries concerning data content on gender issues, as well as these processes could be affected by political discourses in some contexts.

## 6.6. Final remarks and ways forward

In sum, the literature and partner GEP experience highlights the importance of a careful consideration of how, when, and with which groups the data collection is undertaken in order to advance existing GEPs and design more inclusive actions with a positive impact on multiple inequality groups. There are a number of steps which should be undertaken, and these can be summarised by the following schematic procedure:

Figure 6.1: Steps for inclusive data collection and analysis



The above diagram should be treated as a guideline for RPOs with existing GEPs which are being re-designed, but also to develop new plans, and monitor and evaluate existing actions. The cycle here indicates that the data collection should be conducted regularly to: identify inequality groups within the organisation; identify how multiple inequalities are affecting individuals and which actions would be of most benefit; evaluate the implemented actions and monitor for change; and, finally, to monitor for any unintended consequences (e.g. negative effects or increasing inequalities).

## 7. Concluding remarks

As outlined throughout this report, the overarching goal of the NEXUS project is to bolster the institutional change by developing inclusive GEPs in the intersectional and intersectoral direction. As all the implementing partners have GEPs already in place, albeit at different stages of implementation, the focus of the project is the improvement of existing plans through the design of new actions and practices. It is important to emphasise that this process cannot occur in a vacuum but rather should be embedded in, and informed by, the institutional context and by the current GEPs. Thus, following the guidance outlined in the GEAR Toolbox (although set up for development new plans), tasks involved in the Work Package that this report is based on, involved the in-depth analysis of the existing status-quo of the participating organisations, including the data collection practices, the state of knowledge on the institutional inequalities, and the GEPs themselves. Furthermore, existing promising practices were also analysed in this report in order to provide examples of inclusive actions.

Understanding the state-of-play in the implementing organisations was the main focus of the analysis and provided important information to be used when designing the ways forward. Intersectionality and intesectoriality were the key dimensions of the analysis, as well as the contextual factors, such as institutional commitment or challenges encountered. With regard to these, several synergies, as well as differences were identified among the consortium partners. Most importantly, an insufficient attention to intersectional inequalities was identified as the main gap. Even though some of the implementing organisations recognised the importance of adapting intersectional approaches in their GEPs, the actual actions included in the plans were mainly focused on gender. Furthermore, there was a clear need for more inclusive data collection necessary for the improvement of the existing GEPs as inequalities, with exception of gender, were often internally not sufficiently identified. It needs to be emphasised that the lack of disaggregated data, and the lack of data organised in a way that facilitates intersectional analysis has been noted in the existing literature as the most common challenge to inclusivity and this was illuminated in the analysis of implementing partners data collection practices. In other words, while the organisations had an overview of which groups need to be addressed, a more systematic and comprehensive data collection and analysis would be required in order to properly design and implement inclusive practices. However, what also should be considered in this context are national and institutional barriers related to data collection (e.g. GDPR). Improving data collection will require institutional commitment and, if the data can be collected on a voluntary basis, trust and awareness needs to be developed among staff members and, where applicable, students. Dedicated resources are also crucial to the success of in-depth understanding of intersectional inequalities.

All the above issues were highlighted by the consortium partners as challenges or areas for improvement. While some reported high levels of institutional commitment, other partners reported low levels of understanding of, or commitment to, making the GEPs more inclusive. This was particularly the case of partners located in Associated countries and some of the New Member States. Trust among staff, as well as the awareness of intersectionality was also noted as a possible obstacle, with similar geographical patterns as observed in terms of institutional

commitment. This shows the need for more training and awareness campaigns in all the institutions. Intersectoral approaches were also assessed as insufficient as the majority of partners did not involve any external stakeholders in their GEPs; however, some examples of such collaborations were included, particularly in the analysis of promising practices, and this aspect would require further scrutiny.

Furthermore, it should be noted that, as argued by other studies, such resistance to change can be channeled as a positive and be utilised to illuminate inequalities and thus contesting the prevailing values and beliefs. In this context, handling of the resistance can be used as part of the process of transformation. This important aspect of institutional change should be therefore included in all the phases of GEPs redevelopment and utilised for the future monitoring and evaluation.

Finally, the authors of this report, on behalf of the consortium, would like to emphasise that while the analysis was conducted among a small number of institutions, and thus has its limitations, the methodology used for the assessment of GEPs and the practices of data collection is highly transferable to other HEI and RPO settings. Similarly, the methodology subsequently developed for guiding of more inclusive data collection can be used outside of this consortium.

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## 9. ANNEX: GEP data collection document analysis summary report

**Table 4.4. Specific indicators considered during the analysis for the GEP development.**

Specific indicators considered during the analysis for the GEP development	AGH	BZN	FU	IIT	KU	SU	TU Dublin	NU	UM
Staff numbers by gender at all levels, by disciplines, by function (including administrative/support staff) and by contractual relation to the organisation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Average numbers of years needed for women and for men to make career advancements (per grade)	Yes	No	Partially	Yes	Yes	No	No	No	No
Wage gaps by gender and job	Yes	Yes	Partially	Yes	No	No	Yes	N/A	Yes
Numbers of women and men in academic and administrative decision-making positions (e.g. boards, committees, juries);	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Numbers of women and men candidates applying for distinct job positions	No	No	Partially	Yes	Yes	No	Yes	No	Yes
Numbers of women and men having left the organisation in the preceding years, specifying the numbers of years spent in the organisation;	No	No	Partially	Yes	Yes	No	Yes	No	No
Number of staff by gender applying for / taking parental leave, for how long they took leave and how many returned after taking the leave	yes	No	Partially	Yes	Yes	No	Partial	Yes	No

Numbers of absence days taken by women and by men, differentiated by absence motive (sick leave, care leave, etc.);	No	No	Partially	Yes	Yes	No	Partially	No	Yes
Numbers of training hours/credits attended/received by women and by men	No	No	Yes	Yes	No	No	Yes	No	Yes
Shares of women and men among employed researchers	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Shares of women and men among applicants to research positions, among people recruited and success rate, including by scientific field, academic position and contract status	No	No	Yes	Yes	Yes	No	No	No	No
Shares of women and men on recruitment or promotion boards and as heads of recruitment or promotion boards, and shares of women and men in decision-making bodies, including by scientific field	No	No	Partially	Yes	No	No	Yes	No	No
Share of men and women principal investigators in submitted and selected projects and their respective success rates	Yes	No	Partially	Yes	No	No	No	No	No
Share of men and women in the research teams of submitted and selected projects, and the distribution of tasks and roles among each team?	No	No	Yes	No	Yes	Yes	No	No information	No
<b>Student-related questions (where relevant)</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>

Number of students by sex/gender at all levels and by disciplines?	Yes	NA	Yes	NA	Yes	Yes	Yes	Yes	Yes
Share of students from disadvantaged background by sex/gender at all levels and by disciplines?	No	NA	Yes	NA	No	No	No	No	No
Share of international students (specify type and whether or not Erasmus/other type) at all levels and by discipline	No	NA	Yes	NA	Yes	No	Yes	Yes	No
<b>Intersectional/Intersectoral indicators questions</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>
Does your organisation break down data beyond gender to facilitate exploring differences between women and men based on other individual or group features such as people with a migrant or minority background, people with disabilities, people with low socio-economic status or at risk of poverty, members the LGBTIQ community?	No	No	Yes	No	No	No	No	No	No
Is data being collected according to gender identity, for example, including at least three categories considered: woman, man, and non-binary (or gender-diverse)?	No	No	No	Yes	No	No	Partially	No	No
Does your organisation monitor for intersectoral movement of staff (particularly researchers)?	No	No	Partially	Yes	No	No	No	Yes	No
Does your organisation monitor future career paths of your PhD students to allow to track intersectoral transfer?	No	No	Partially	No	No	No	No	Yes	Yes