



EUROPEAN COMMISSION  
RESEARCH EXECUTIVE AGENCY

Unit B5 – Spreading Excellence, Widening Participation, Science with and for Society

## **H2020 Gender Equality Plan Projects Cluster Event**

### **Report on Key Findings**

On February 28<sup>th</sup> 2018 a H2020 Gender Equality Plan (GEP) projects networking and brainstorming event was organized by Unit B5 of the Research Executive Agency and Unit B7 of DG Research and Innovation. Both Units are responsible for the Science with and for Society Programme from two different perspectives: the first follows implementation and the second is responsible for policy-making.

In the context of this event, three parallel workshops were organized in a "World Café" style. Each workshop involved approximately 15 participants of funded GEPs projects (both from FP7 and H2020), Attendees were rotating and were contributing to each and every one of the parallel sessions. Each workshop took place 3 times and each session lasted around 1 hour.

The three workshops focused on the following topics:

- A. Implementing GEPs,
- B. Evaluating GEPs
- C. Sustainability of GEPs.

All three of them were structured with one moderator coming from one of the H2020 projects who led and animated the discussion and facilitated the exchange of opinions. In addition one rapporteur, expert in the field, was responsible for capturing the main points and subsequently summarising them in a report. The three contributions are included in the present document.

## A) Implementing GEPs

Rapporteur: Silvia Gómez Ansón

**Moderator:** Sonja Reiland (LIBRA)

**Project Officer:** Raluca Iagher

**Policy Officer:** Marta Artiles-Viera

### 1. Introduction

The workshop centred on a range of issues related to *Implementing GEPs*, discussing the specific obstacles and barriers encountered by participants within their own organisations/projects and trying to collectively come up with practical solutions to overcome them. With the objective to identify the main issues related to Implementing GEPs, topics for possible discussion during the meeting were proposed by the projects ahead of the workshop. The moderator, Sonja Reiland, scientific project manager of the LIBRA project, considered these topics to present the questions or issues for discussion. Dr. Reiland identified and proposed four main questions:

a). - What are effective mutual learning/ exchange tools and formats inside the consortium?

This question related to: how partners share (or would like to share) experiences with other partners within the consortium, what tools are considered more efficient in facilitating the exchange of experiences between institutions and how partners may learn from each other.

b). - Which methods work to convince scientists of the importance of the inclusion of the gender dimension in research? How to avoid possible negative reactions or dismissal of the issue?

From the three objectives that underpin the strategy on gender equality in Horizon 2020 and the European Research Area (which are: fostering gender balance in research teams, ensuring gender balance in decision-making and integrating the gender dimension in research and innovation (R&I) content), the last one, is probably the least tackled by GEPs, probably due to its complexity.

Presenting the necessity of integrating a gender dimension in research may provoke negative reactions and dismissal of the issue because researchers think that it is not relevant for their research or may not feel confident to engage in or supervise multi-disciplinary research that includes a gender dimension. Sometimes, the inclusion of a gender dimension in research may be considered ideological and not linked to excellence or science-specific concerns. Thus, it is important to find ways to integrate the gender dimension in research while adapting to different disciplinary contexts.

c). - How may resistance to change be avoided? How may a gender-sensitive environment in the involved institutions be developed? How could it be ensured that the formal signed commitment by the high level management turns into real commitment or action when projects are implemented?

Resistance to GEPs may be found at the different levels of the organisations; thus, it is crucial to understand the reasons underlying the resistance and the means to overcome it, how to develop a gender sensitiveness at all organizational levels and how to ensure that high level managers do really get involved and are committed to the GEPs.

d). - How to deal with gender issues saturation at institutions? How to overcome what has been denominated *gender fatigue*?

Within organizations, workers may be “saturated” with gender issues, they may even experience what has been named gender fatigue, a situation characterized by workers that are tired of pointing at gender discrimination and prefer to see a world that is gender egalitarian, where gender no longer matters<sup>1</sup>. A key for the success of GEPs is to involve workers at all organizational levels in GEPs implementation avoiding these situations.

## **2. Responses of participants to the discussion issues or topics**

During the workshop, participants provided valuable input in lively and active sessions of one hour. Due to time limitations not all questions could be treated in all sessions. The ideas and responses are exposed for each of the four main questions posted by the moderator.

a). - What are effective mutual learning/ exchange tools and formats inside the consortium?

Communication and coordination within the Consortium and the partner institutions is crucial for the implementation of GEPs. In fact, participants considered that if communication and coordination fails, it is very difficult to experience mutual learning. In order to ensure effective communication, a culture of trust between partners is essential.

Partner institutions all employ usual communication tools such as emails, intranet and social media and consider them to be useful, but just to some extent. For example, some participants cast doubt about the effectiveness of common platforms for the dissemination of results. Holding well-prepared regular virtual meetings between partners is considered very important. Monthly virtual meetings may be especially helpful as support for partners that have not implemented GEPs. Meetings should be prepared beforehand involving the different stakeholders. Thematic workshops during meetings are named as very effective.

On-site visits are considered very important, especially bilateral visits. Face-to-face meetings are considered crucial.

A good and effective practice that facilitates communication and GEPs implementation is to list all existing measures from partners at the start of the project (share results of gender auditing), as this helps to understand existing context of partners. Knowing and learning about the situation of the other partners is considered very important. In this sense, another initiative mentioned was sharing a collection of good practices. Mutual learning and sharing experiences related to the evaluation process is also considered

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Kelan, E. S. (2009): “Gender Fatigue: The ideological dilemma of gender neutrality and discrimination in organizations”, Canadian Journal of Administrative Science, Vol. 26, 197-210.

crucial, although not all institutions may fully communicate possible resistances they may encounter. Mutual learning and sharing should be implemented and developed within the institution; as is important to involve staff.

All participants agreed that the exchange of experience is very important. Although some consider it to be especially important in cases of greater heterogeneity (they consider important to be aware of differences), while others prefer homogeneity for sharing experiences.

b). - Which methods work to convince scientists of the importance of including the gender dimension in research? How to avoid possible negative reactions or dismissal of the issue?

Participants pointed out that institutions should put an effort in including the gender dimension in research. Usually this is the least emphasized aspect and may be the most difficult one to address. Even though H2020 encourages organizations to cross barriers, there still exist barriers for multi-disciplinarity.

A first step in the institutions and as well as in the GEPs should be to clarify for which research a gender dimension in research and innovation content is relevant and in which it is not. A general rule could be that *a topic/research field is considered gender relevant when it can be expected that its findings affect women and men or groups of women and men differently.*

Another aspect is to see how excellence is defined. Organisations should change the mind-set and should convince researchers and managers that the complexity brought by the integration of the gender dimension in research where relevant increases excellence of their research. In this regard, the creation of incentives and/or the establishment of possible sanctions (including money and/or sanctions related to money) may help overcome barriers.

Multi-disciplinarity and the inclusion of gender experts and expertise within research groups may also be convenient. Increasing the number of gender related trainings within H2020 projects and presenting good convincing case studies might be possible means to reduce negative reactions.

c). - How may resistance to change be avoided? How may a gender-sensitive environment at the involved institutions be developed? How could it be ensured that the formal signed commitment by the high level management turns into real commitment or action when projects are implemented?

The roots of resistance to the implementation of GEPs may be various: lack of knowledge, lack of resources and training, etc., and they have to be understood in order to be able to tackle them.

Incentives are also envisaged as crucial in order to overcome barriers. Institutions and the different organizational parts of partners should be made aware of the existence of incentives to implement GEPs.

Trainings that exhibit the benefits for institutions may also play a role to overcome resistance. In this sense, the way of communicating and “selling” the need to implement

the GEP is also important, as people may be suspicious of words such as “gender equality”.

Resistance to change was identified at different organizational levels, at high level and medium level management. Although high-level management has signed a commitment to implement the GEP, this “signed” commitment needs to be transformed into a “real” commitment. In this regard, the coordinator shall be active and remind the high-level managers about their commitment. Therefore, the high level management should be accountable to what it has signed and shall stand behind in the importance of implementing GEPs and to be a role model at all stages of GEPs.

Some participants also mentioned the success of external experts that worked as ambassadors, in the sense of role models for the partner institutions. Participants also referred to the possibility of establishing sanctions if GEPs are not implemented and/or linking gender equality measures to money. Medium level management should also be convinced about the interest of GEPs and their awareness should be raised. On this subject, the impulse of high level management is necessary; grass-root networks are relevant as is all staff and they should be involved. Trainings that focus on improving the context, on inclusion, and on quality/excellence may support change. Additionally, some participants mentioned the need of counting on fully operative and supporting Equal Opportunities Offices.

d). - How to deal with saturation at Institutions about gender issues? How to overcome what has been denominated *gender fatigue*?

Participants considered that, although situations may vary according to the institutional and country setting, some actions might avoid unwanted effects related to saturations or gender fatigue at institutional level. These actions are linked to the need to educate staff at all levels. In this regard, for example, success stories from previous funded projects could be compiled and could be presented to staff at partner institutions at workshops or trainings; gender aspects could be part of other trainings offered at institutional level (for example, institutions could include the gender dimension in trainings related to how to improve research, how to write research projects, how to design a research career, etc.). Other tactics could include bringing in people that could act as role models for the targets of the projects.

### **3. Conclusions**

The brainstorming workshop about Implementing GEPs turned out to be very productive and informative. Due to lack of sufficient time not all the issues posted by the moderator could be dealt with in depth at all sessions. Participants were very engaged and willing to share experiences and opinions. The workshop revealed how fruitful it is for funded projects to learn from one another no matter what their the geographical position is an independently from their branch of knowledge. Since they partake numerous situations, concerns, and the like, they may also benefit greatly from mutual learning and solutions previously adopted.

Overall participants deemed that several elements such as raising awareness, training, involving all staff, including medium and high level management, accountability of institutions and communication between partners and within institutions are all crucial to overcome barriers and to effectively implement GEPs.

## **B) EVALUATING GEPs**

Rapporteur: Matteo Picchio

**Moderator:** Marina Cacace (LIBRA)

**Project Officer:** Katherine Quezada

**Policy Officer:** Anne Pépin

### **1. Introduction**

The discussion focused on four main points (see workshop outline for specifications): the functions of evaluation (the WHY), the promoters of evaluation (the WHO), the object of evaluation (the WHAT), the methods of evaluation (the HOW).

### **2. Responses of participants to the discussion issues or topics**

#### **The functions of evaluation (the WHY)**

It was highlighted that one of the most important functions of monitoring and periodic evaluation based on quantitative and qualitative data is the support provided to self-reflection on GEP implementation process, to assess whether the project is on track and to find solutions to emerging problems. Other relevant functions are to establish a common framework among the different action plans and to provide useful opportunities of involving people in the implementation process by discussing results and challenges with internal stakeholders.

Indeed, descriptive indicators based on the collected data can be very useful to promote gender equality within the institution and overcome resistance, since they are empirical evidence of possible gender imbalances. The availability of a systematic collection of data on different aspects of gender equality can moreover support the sustainability of the project if the new data collection procedures are included in the regular operations of the organisation.

Among the various functions of evaluation, comparing the success of different projects or action plans is not the most meaningful or the easiest, given the large differences in the initial situation and contextual conditions across countries and institutions. Using rubrics to identify progress based on a typical scale of progress towards gender mainstreaming could be more useful, also to highlight the path forward.

Partners might have different expectations from evaluators and regarding the kind of support they can receive. A detailed discussion and precise communication about the role of the external evaluators among the GEP implementing institutions might be a useful step for the partners to understand and to disentangle the evaluators role from that of gender experts providing support to the GEP implementation process.

## **The promoters of evaluation (the WHO)**

The difference and respective limits of monitoring and evaluation activities are sometimes unclear. Devoted meetings have been held in some projects to make a clearer distinction. The monitoring, as a continuous data collection process, is often seen as self-assessment (internal data collection procedures), while evaluation activities dedicated to assessing the effectiveness of the implemented GEPs in reaching their objectives is allocated to external experts. Still, some partners found it useful to allocate the activities of monitoring and evaluation to different groups: e.g. scientific board and expert groups with expertise in GEP implementation. In some other projects, however, monitoring and evaluation are strongly interconnected.

The “critical friend” approach adopted by external evaluators was often raised in the discussion. Among the advantages, the following have been mentioned: it is tailor-made, supportive (possibility to set common targets), enhancing self-reflection, assuring the contribution of relevant expertise from experience in other projects.

Still on the relation with external evaluators, it is reported that sometimes the evaluator is too friendly and lacks a critical approach, thus not supporting improvement in implementation. In other cases, if the evaluators are too critical, this weakens team motivation.

It can also happen that the tools provided by the evaluator – as an outsider – are not detailed and analytical enough to evaluate the situation of the institution and to collect comprehensive information in order to get the full picture. Alternatively, the feedback from the evaluator is not considered by the institutions because of lack of trust. In order to have a fruitful relation between the evaluator and the implementing institutions, it is important to create trust, openness, and sincerity between the parts involved, to create occasions for face-to-face meetings and work besides at-a-distance collaboration.

## **The object of evaluation (the WHAT)**

GEP design and the process of GEP implementation, unlike outcomes, are not always evaluated, although their evaluation can generate important information, especially for the sustainability of the GEPs.

It is highlighted how difficult it is to provide quantitative evidence of the impacts of the project, given the complex nature of the GEPs and their environment. Moreover, it is difficult to identify the longer-term impact of the GEPs separating it from, for example, the impact induced by changes at national level. Moreover, when longer-term impacts are meaningful to assess, the project is often already over.

A different approach might be needed to increase the credibility of impact assessment, like, for example, more strongly integrating process and result evaluation, using qualitative and quantitative assessment for both.

Concerning the evaluation of sustainability, besides traditional indicators (referring to whether new positions have been created, or a budget has been allocated), the creation of bottom-up groups (such as women researchers’ networks, taking in charge the continuing implementation of some GEP actions) has been considered in some cases as reliable indicators.

Evaluation sometimes fails to capture real problems related to the institutional set-up within the organisation. For example, although an institution already had ongoing action plans on gender at university level, the team was not able to transfer what was done during the H2020 project into the already existing gender action plans because they were not empowered to do so by higher management. The evaluation procedure was not able to capture this important limit in terms of sustainability.

### **The methods of evaluation (the HOW)**

Surveys to measure the evolution of the cultural values of the staff in relation to gender and gender policies can be suitable to assess the results of GEP implementation.

Members of one project reported their positive experience: they ran surveys and interviews among the staff on the feeling they had about gender issues and gender activities, as a way of understanding the effectiveness of GEPs. They found that males felt threatened by the new career opportunities generated by the GEPs for females, which they interpreted as evidence of the success of the GEPs in structurally addressing the problem.

About indicators in general, it was suggested that an important lesson learned over the years is to keep them simple, not too detailed, and use well-established indicators. This is especially important at the beginning of the project, when it can still take different directions and the indicators need to be generic and flexible.

When designing surveys, it is important to consider how people from different countries will understand the questions. It is important that specialists take care of the translation to avoid heterogeneous understanding of the same questions.

As a potential problem related to different aspects of monitoring and evaluation, the stress in filling in all the necessary forms to feed the groups in charge of the internal evaluation is mentioned, as well as the overlap of the data collection activities between the dedicated work package and internal evaluation. When this was the case, the risk and the problems were reduced by creating shared online tools.

The creation of electronic tools is also very important to collect data and monitor the evolution of the situation over time. This is especially important for large institutions. Having routinely the publication of reports is an important way of evaluating the situation over time, in the long-term, and attain sustainability.

### **3. - Conclusions**

The brainstorming on GEPs evaluation was organized around four main points:

- In terms of functions of evaluation, it was emphasized that the key role is in descriptive indicators based on collected data on promoting gender equality within the institutions and overcoming resistance. The difficulties in comparing the success of different projects or action plans were however stressed, given different initial and contextual conditions among the institutions.
- Regarding the second topic, the promoters of evaluation, a different view emerged about the usefulness of splitting monitoring and evaluation across different

partners. In order to have a fruitful relation between the evaluator and the other partners, the following components are also important: the creation of trust, openness, and sincerity between the parts involved and having occasions for face-to-face meetings in addition to at-a-distance collaboration.

- About the third point, the object of evaluation, it was highlighted that the importance of evaluating is also in the design and the implementation process of GEPs. The difficulties in producing quantitative evidence of the impacts of the project were also highlighted, given the complex nature of the GEP, their environment, and the long-term impact of the GEPs.
- Finally, concerning the fourth point, the methods of evaluation, it was considered important to stick to well-established indicators and to keep them simple. It was also suggested that often the processes of monitoring and evaluation generate stress among the partners due to the need of filling several forms. Online tools have proved to be very useful in making these processes less demanding, especially in large institutions.

## **C) SUSTAINABILITY OF GEPs**

Rapporteur: Jennifer Dahmen

**Moderator:** Tullia Gallina Toschi (PLOTINA)

**Project Officer:** Antonio Scarafino

**Policy Officer:** Nina Baumeister

### **1. - Introduction**

After explaining briefly, the structure of the workshop, a short introduction round of the participants followed. The moderator then informed about the aim of the workshop: to discuss practical solutions, for ensuring a sustainable effect of the implementation of a GEP<sup>2</sup> after the EU-funding has ended. Two of the workshops included a short exercise, where participants were asked to write down short-, medium- and long-term solutions for sustaining GEPs and why, according to their opinion or experience they (should) work.

### **2. - Responses of participants to the discussion issues or topics**

Mid-term evaluation of the SwafS showed that the long-term impact of the structural change projects cannot be judged right after the project's end as more time is necessary. This unlines that **thinking about the sustainability of GEPs after the actual**

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<sup>2</sup> Comment: Even though the initial question was on how to sustain the implemented GEPs in the RPOs, the focus in each workshop mingled a bit towards questions of "How to achieve gender equality?" or "How to sustain gender equality issues?". Which is of course not exactly the same but with overlapping aspects.

**EC funding phase needs to start already in the beginning of the project**, if not already during the proposal writing. Beneficiaries should think at an early stage how the GEP could enforce their effectiveness and how sustainability beyond the project lifespan could be ensured. The GEP project itself, during its course and EU financial support, needs to generate human and economic resources.

Also, the general and local units coordinators of the projects implementing GEPs and their management need to be aware that the EC-funding has to be regarded as first impetus for initializing gender equality actions. Further progress after the funding period might need **continuing financial support**. One action to raise awareness for the need of continuing financial support could be a forecast of the development of gender equality issues mid-term of the implementation process. This timing is crucial for convincing the management of the organisation of the topic's importance and to focus on sustaining the GEP actions after the end of the project (i.e. the gender equality incremental implementation, with a certain allocated budget, independent from that given by the EU projects, provisioned in the strategic planning year by year).

Some participants also requested that sustainability be mandatory in the GEPs topics with the necessary consequence that this aspect will be monitored by the Research Funding Agency during the implementation of the project. A mandatory 'sustainability plan' could be requested including short, middle and long-term solutions. However, one needs to be aware that newcomers in the field could feel intimidated by such an additional requirement. Thus, this possibility should be weighed against the need to lower the barriers for newcomers.

One aspect for overcoming the so-called "gender fatigue", a condition, where people feel oversaturated with gender equality as theme, is to change the notion of how gender equality is communicated within the institutions.

A **reflection on how to "sell" and promote gender equality** in organisations and to its individuals could be helpful. It needs to be transferred that (gender) equality is beneficial for all people inside the organisation, not only for women, as certain groups often assume it. The aim of structural change is to create a fair, inclusive and attractive work environment for the organisation as a whole including technical staff and students.

Implementing a GEP can be regarded as facilitator, which enables organisations to reflect upon their power structures, recruitment and promotion standards, salary distribution, work ethics etc. It should lead to a change in the workplace culture preferably impacting all people, and thus improving the social reputation of science. In order to ensure continuing institutional effects, **the GEP implementation has to address target-group specific needs**. Linking gender equality to the impact diversity in teams has for conducting research, to science innovation, to RRI or also broader to the excellence discourse, can further promote it without being labelled as women's only issue.

One major obstacle, which was mentioned by several workshop attendees, is a change in the top-management during the project implementation. This can be an occasion of quicker implementation or a crucial problem if the new management just appointed does not consider gender equality as a significant management duty. Therefore the development of an organisational **gender equality policy with defined commitments and targets**, is regarded as the most effective long-term strategy to assure sustainability concerning equal opportunities. An integrated policy in management structures makes successors likewise accountable for gender equality matters. Working on **internal**

**institutional policies and regulations** should be prioritized during the implementation of the GEP as it supports the institutionalisation of gender equality in the long term.

Two additional options for institutionalizing gender equality in organisational structures are the **establishment of a gender equality board/committee**, or when this is not available, the **creation of a dedicated equal opportunities office/unit**. It is important that both are equipped with adequate human and economic resources. Nevertheless, even more than this, it is fundamental that **gender equality themes permeate the governance and structure of the organisation**. It is not uncommon that these gender equality boards/committees are only formal and that their functioning depends very much on the the people involved.

Committees should consist of a balanced group of representatives (all genders, representing all status groups, academic and technical staff, different fields of knowledge, as well as persons with particular experience regarding equality issues), this will ensure an appropriate representation of all organisation members.

Monitoring the progress of gender equality should be an obligatory task performed by the data warehouse of each administration of the organisation in collaboration with the designated gender equality unit. A good and cost-efficient tool to track the progress made is the policy provision, the creation and the publication of **a mandatory Annual Gender Report**. The effectiveness of actions and the changes made can be tracked and supported by statistics and figures. It would make a snapshot of the current organisational state of affairs regarding gender equality and can also serve as a base for gender budgeting. Further, goals and GEPs can be re-defined annually. Moreover, **performance indicators can be setup and connected to rewards or budgetary incentives for faculties/departments, at local, national or, better EU level**.

Mapping and monitoring the implementation progress, through specific indicators, is also essential to demonstrate that change is actually happening and how it works. It supports the visibility of GEPs or single measures after the funding process, which again can motivate new people to take up new actions or to support an existing one.

Speaking of accountability also leads to the question on who are the change agents in the organisation and who should be made accountable for the GEPs. Opinions about this are various and depend on the participants' experiences and the fact that Research Performing Organisations (RPOs), including universities are very complex organisations. Decision-makers should be empowered to strive for gender equality.

At least one delegate for gender equality in each department could also help produce long-term impact. Involving more people means also sharing responsibilities and supporting each other. But again the risk is to create a figure to silence the problem and therefore the figure in charge should be strategic, and very close to decision makers.

Building a **community of gender equality advocates** inside the organisation can be a useful tool for mutual empowerment and exchange. This is especially important since dealing with gender equality is mainly not a reputable and accepted work task.

Ideally, all involved academic change agents should have profound knowledge in gender equality matters while at the same time being excellent researchers in their own scientific fields. Generally, the personnel involved need to know and understand their organisation

very well. An interdisciplinary team would be an additional advantage to better address differences across disciplines.

A huge challenge is the rotation of staff members due to non-permanent working contracts. Staff employed on a project-basis can leave after a certain time and sometimes they are the ones who had done the practical day-to-day implementation work. Preserving this knowledge is key here. An '**Implementation Logbook**' is a practical solution to keep this knowledge. Team members should update it on a regular basis, so that others can reconstruct what worked best and what did not work during the implementation processes. Furthermore, it should also include formal and informal sources of information.

Creating a kind of **portal for gender equality/the GEP** on the institutional website, provides an opportunity for staff members to find updates on the progress of the implementation. Making work visible is an important aspect here. It should also serve as a useful source for specific target groups (e.g. academics, technical staff, lecturers, researchers, HR manager, etc.) and provide information about the importance of gender equality. A lack of knowledge, existing stereotypes or the assumption that gender equality is already achieved are common barriers and misconceptions practitioners have to face in their daily work life.

**Gender equality knowledge** should become a mandatory part of the job profile for new staff members; indicating it as a requested and appreciated skill will reinforce its importance for the organisation. In addition, gender equality should become an integral part of leadership training.

**Gender equality trainings** should be regularly offered not only with a focus on structural and legal institutional aspects, but also to support academia in integrating the gender dimension into their teaching and research content. The latter would additionally support the competitiveness of researchers applying to funding programmes, which request the gender dimension as a cross-cutting theme.

**Results of the GEPs should be disseminated outside the organisation.** Fostering the collaboration with other organisations implementing GEPs or trying to institutionalize gender equality on a regional and national level can support the exploitation of the results also after the project implementation.

**Networking** provides a chance for knowledge transfer and exchanging experience, which could lead into the establishment of regional/national community of practice for gender equality. Good practice examples could be shared and adapted by other interested institutions. Ministries for education and research (or likewise political core areas) as well as other relevant stakeholders should be included in this process.

The strongest mechanism for committing RPOs, including universities in the long-term for gender equality seems to be the **inclusion of a gender dimension in research and innovation content and gender equality aspects as evaluation criterion in research proposals to be funded by RFOs**. Funding organisations/research councils should emphasize gender issues as requirement for receiving research funding. RPOs that meet certain equality standards could be offered better access to research funding.

Departments excelling in gender equality should be acknowledged as role models for followers. Institutional rewards, like a **gender equality award** connected with prize

money, can serve as incentives. Progress and advancement should be recognized/rewarded for keeping people motivated on one hand and for attracting new beginners to take up further action on the other.

**A European award system for gender equality together with an EU map of the Institutions implementing GEPs** are also regarded as the most efficient practices for further promoting gender equality and structural change in RPOs and RFOs. Institutions successfully labelled with this possible EU award could receive an additional budget when applying for funding. Being awarded as gender equal organisation could also become a mandatory requirement when applying for European funds.

These ideas were exemplified by the British Athena SWAN Charter<sup>3</sup>, a programme focussing on the advancement of women in higher education institutions or single departments. The programme promotes change in the organisational culture, which honours universities, departments or research centres with bronze, silver and gold awards, depending on their degree of commitment and advancement for gender equality. This mixture of a ranking and a rewarding system seems to be well recognized and could be taken as an example to implement a EU strategy.

Establishing a **EU-wide recognition system** could support a growing culture towards gender equality, hence it could become prestigious to apply for participation. Following the British example, a membership fee could be requested to RPOs for joining the programme. Organisations applying for the EU recognition system would need to be monitored on a regular basis. Further launching this kind of recognition system for gender equality could lead into a Europe wide mapping and ranking scheme, which would allow the identification of RPOs in Europe with recognizable gender equality commitment.

Equality prizes for outstanding or fast-developing institutions could even foster this recognition process. Embedding **gender equality as an evaluation indicator** in already existing prestigious (national/European/global level) **ranking** systems/awards could be an additional option.

At this point what would be problematic is the structure of a possible standardisation system for comparing the state of gender equality at RPOs and RFOs. The diversity of organisations in Europe and their related country-specific differences require a complex evaluation scheme including related process and performance indicators.

Enlarging the discussions to national and European association and networks like "The League of European Research Universities" (LERU) could further support spreading the recognition and importance of institutionalized GEPs.

A similar approach could be used by accreditation schemes for academic programmes/degrees through the integration of gender equality as an evaluation indicator.

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<sup>3</sup> <https://www.ecu.ac.uk/equality-charters/athena-swan/> (9.3.2018)

## Conclusion of the Sessions

- Embedding gender equality in a sustainable way in RFOs and RPOs is a challenge, which the majority of projects have not successfully solved yet. The level of effectiveness for possible solutions is difficult to assess for the majority of participants.
- The sustainability of GEPs has to be considered from an early stage and not just before the project is close to its end. Dedicated strategies have to be developed and specific actions shall be adapted if necessary, and in a cost-efficient way.
- The institutionalization of gender equality can be achieved by embedding gender equality in official institutional regulations. This should be a priority during the implementation of GEPs, although in this area practitioners are likely to encounter the highest resistance.
- Furthermore, the establishment of special bodies that deal with gender equality issues in the organisation confirms its importance and helps keep the topic on the institutional agenda.
- The responsibility for pushing the institution towards a gender equal development should not rely on single persons but rather needs to permeate the organisation and is effective if an interdisciplinary team is involved.
- A critical mass that owns the change process in the organisation is needed. The EC funding can support the creation of such a 'task force' and help to connect people who advocate gender equality.
- GEPs have to be perceived as a chance for RPOs and RFOs to reflect upon their established and often not questioned processes and structures, with the aim to create better working conditions and professional environments.
- Preserving the organisational and practical knowledge gained while implementing GEPs is of key importance (e.g. Implementation Logbook).
- Achievements and positive effects of GEPs need to be made visible to the community.
- A GEP can be regarded as successful, if actions continue after the project's end and with some guaranteed budget. Thus, involved gender equality promoters and target-groups within the organisation do not get the feeling that dealing with gender inequalities on an institutional level was only a one-shot action and priority during the EC funding.
- An Annual Gender Report should track and control the progress (or in case of non continuation of the GEP the backlash) of the organisation towards gender equality. Its publication is an invaluable strategy in terms of dissemination. Connecting the gender equality controlling to target agreements with departments/deans involving monetary incentives for good performance could be an additional advantage.
- On a policy level, a common notion was obvious for the workshop attendees: linking gender equality to the application of national and/or European funds as a mandatory requirement will have the most lasting impact in RPOs and their commitment towards it. This could be combined with a European

award/certification/ranking system, which labels RPOs according to their state of gender equality. At the same time this would foster the recognition of the importance of gender equality as a factor for excellence and thus contribute to a European-wide change in science and research institutions.

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## OVERALL CONCLUSIONS

The workshop successfully brought together a number of key stakeholders in the GEP projects funded by FP7 and H2020. Many fruitful discussions took place allowing for an in-depth analysis of some of the common issues at stake.

The main recommendations recurring in all three workshops are the following:

- Project managers should establish a relationship of openness and sincerity with the other stakeholders, especially with senior management.
- The accountability of the main actors is crucial to ensure long-term impact of GEP projects. Top management's formal pledge for gender equality should be backed up by real commitment.
- It is crucial to communicate clearly what the main issues of gender equality are and what are the benefits of gender inclusiveness for research institutions, for both men and women.
- Gender equality topics should be incorporated in training on a wider array of themes, not only in courses specifically dedicated to gender issues.
- Better results are achieved by multidisciplinary project teams composed of both experts on gender issues, as well as researchers in other fields.

Project coordinators are invited to further reflect on the challenges faced by their projects and to see how the above recommendations which encompass the three main themes of the workshops, could be implemented in a constructive way.

The GEAR Tool<sup>4</sup> should be used as a state-of-the-art knowledge pool for gender equality plans. Therefore any new deliverables or information developed through the Horizon2020 projects giving an added value to the tool is welcome. Please contact for this [nina.baumeister@ec.europa.eu](mailto:nina.baumeister@ec.europa.eu) directly.

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<sup>4</sup> <http://eige.europa.eu/gender-mainstreaming/toolkits/gear>