

# Gender equality plans in academia and research: roadmap to effective implementation

Gender equality is a fundamental value of the European Union <sup>(1)</sup> that is mainstreamed into policy areas and laws to combat gender inequalities in the EU and its Member States. Nonetheless, the field of research and innovation (R & I) is marked by **significant gender inequalities** <sup>(2)</sup>. Combating these inequalities entails, among other things, eliminating gender bias in research-related assessment, recruitment and promotion procedures; reducing gender stereotypes; fighting gender-based violence in R & I organisations; creating inclusive working conditions; and promoting research approaches that include a sex/gender analysis.

The EU's new R & I funding programme, Horizon Europe, addresses gender inequalities and gender bias in R & I, and

all organisations applying for funding must have a gender equality plan (GEP) <sup>(3)</sup> in place to be eligible for funding.

A GEP is a systematic and strategic instrument that aims to combat and reduce gender imbalances and gender inequalities in R & I organisations by transforming the organisational processes, cultures and structures that produce these inequalities.

The EIGE gender equality in academia and research (GEAR) tool provides guidance for R & I organisations and research funding bodies on developing and implementing an effective and sustainable GEP following a stepwise approach.



<sup>(1)</sup> Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and The Committee of the Regions, A Union of Equality: Gender equality strategy 2020-2025, COM (2020), 152 final, Brussels, 5.3.2020 (<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020DC0152>).

<sup>(2)</sup> European Commission, Directorate-General for Research and Innovation, She Figures 2021 – Gender in research and innovation: Statistics and indicators (2021), <https://op.europa.eu/s/vWGB>.

<sup>(3)</sup> European Commission, Directorate-General for Research and Innovation, Horizon Europe Guidance on Gender Equality Plans (2021), <https://op.europa.eu/s/vWGC>.

## A stepwise approach to developing and implementing a gender equality plan

### STEP 1: GETTING STARTED

- Familiarise yourself with the GEP concept.
- Identify colleagues with expertise in gender equality.
- Approach potential allies.
- Consider how to make a GEP work in your organisation.

### STEP 2: ANALYSING AND ASSESSING THE STATUS QUO

- Thoroughly review the relevant legal and policy frameworks in your country or region.
- Select indicators to measure different dimensions of gender inequality.
- Collect and analyse sex-disaggregated data to map gender inequalities in your organisation.
- Review organisational settings to detect any form of gender bias.

### STEP 3: SETTING UP A GEP

- Decide on the objectives of the GEP.
- Get inspired by the efforts of other organisations.
- Engage stakeholders through participatory and co-design methods.
- Use a logic model or impact pathway to plan your GEP thoroughly.
- Set specific targets, actions and measures.
- Create a timeline for the implementation of the GEP.
- Attribute resources and make responsibilities clear.
- Expand your network of allies.

### STEP 4: IMPLEMENTING A GEP

- Start to implement the activities set out in the GEP.
- Make the GEP visible in your organisation and beyond.
- Involve all relevant stakeholders.
- Adapt your GEP if necessary.

### STEP 5: MONITORING PROGRESS AND EVALUATING A GEP

- Integrate monitoring and evaluation into your GEP.
- Identify relevant indicators to measure progress based on your logic model or impact pathway (see step 3).
- Collect relevant data continuously during your implementation work.
- Communicate the results regularly within your organisation.


### STEP 6: WHAT COMES AFTER A GEP?

- Start planning the next GEP cycle.
- Revisit the status quo assessment carried out in step 2.
- Make sure that some of your GEP actions have been institutionalised and that permanent support structures for promoting gender equality are in place.
- Benchmark your activities and results against those of other, similar organisations.
- Decide on your priorities and actions, taking into account the results of the monitoring and evaluation.
- Adapt your GEP to recent changes in the policy and legal frameworks at national and EU levels.

## Main features of an effective and sustainable gender equality plan

### The starting point

The **Horizon Europe GEP eligibility criterion** but also national and/or regional legal requirements on developing a GEP are a starting point for engaging your organisation. The Horizon Europe eligibility criterion provides you with a framework for developing your GEP.




### Requirements

To be eligible for funding through Horizon Europe your organisation needs to have a GEP in place that meets the requirements set out below.

Mandatory process related elements:


- public document
- dedicated resources
- data collection and monitoring
- training and capacity building

Recommended content-related elements:

- work-life balance and organisational culture
  - gender balance in leadership and decision-making
  - gender equality in recruitment and career progression
  - integrating a gender dimension into research and teaching content
  - measures to prevent gender-based violence, including sexual harassment
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### Focus on structural transformation

Although training and awareness activities are important parts of a GEP, it should focus on transforming organisational structures, processes and cultures to overcome gender bias and gender inequalities.




### Engage the whole organisation

To trigger structural and cultural change within your organisation, you need to engage the whole organisation. That means involving a broad set of stakeholders but also the various units of your organisation; it also means linking the GEP project to other strategic ventures of your organisation, such as internationalisation strategies and research excellence strategies




### A holistic approach

An approach that takes structure, personnel, power, culture and context into account will promote the effectiveness and impact of your GEP and create the conditions for highly sustainable results. A GEP focused very narrowly on a single issue is unlikely to contribute to sustainable structural change.



### Tailor the GEP to the specific conditions

A GEP cannot be copied and pasted from that of another organisation. It needs to be tailored to your organisation, its culture and its context. Although you might use other GEPs for inspiration, you need to make sure that yours is tailored to your own organisation.



### Use participatory approaches

One important element of turning a GEP into a tailored GEP is using participatory and co-design approaches to co-create the GEP, including its priorities, objectives and measures. This will also help to ensure the engagement of the whole organisation.



### Ground your GEP in a change model

A change model or a theory of change helps you to understand how your activities will contribute to promoting structural and cultural change in your organisation. This will enable you to plan and coordinate your GEP activities more accurately and help you to develop a monitoring and evaluation strategy.



### Take advantage of an intersectional approach to your GEP

Although a GEP is primarily an instrument for promoting gender equality in your organisation, considering other, intersecting inequalities, such as those relating to age, ethnicity, health and sexual orientation, will strengthen your GEP and allow you to broaden your networks of supporters and allies.



### Promoting sustainability should not start at the finishing line

Sustainability needs to be considered throughout GEP development and implementation. It should be an integral part of your day-to-day activities. By following the recommendations made in the GEAR tool, you will be able to increase the sustainability and impact of your GEP.



### Take the pandemic into account

The COVID-19 pandemic has had a considerable impact on gender equality in different spheres of society and has transformed our society at large. So consider the impacts of COVID-19 on gender equality in R & I in your GEP, but also use the transformations related to COVID-19 as an opportunity to promote organisational change.

For more detailed information on how to develop an effective and sustainable GEP in line with the Horizon Europe GEP eligibility criterion, please consult the GEAR tool step-by-step guide and the GEAR action toolbox, which detail inspiring organisational practices to promote gender equality in R & I.

There is a specific step-by-step guide for **research funding bodies** and a specific part of the action toolbox devoted to gender-sensitive research funding.

#### European Institute for Gender Equality

The European Institute for Gender Equality (EIGE) is the EU knowledge centre on gender equality. EIGE supports policymakers and all relevant institutions in their efforts to make equality between women and men a reality for all Europeans by providing them with specific expertise and comparable and reliable data on gender equality in Europe.

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Luxembourg: Publications Office of the European Union, 2022

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