



# INSPIRE

## **D7.2 Strategic alliances & Impact monitoring. 1<sup>st</sup> Report**

**Main author: Elizabeth Pollitzer (Portia)**

**26 September 2023**



**Funded by  
the European Union**



<b>Project no.</b>	101058537
<b>Project acronym:</b>	INSPIRE
<b>Project title:</b>	INSPIRE: Centre of Excellence on Inclusive Gender Equality in Research & Innovation: Creating Knowledge & Engaging in Collaborative Action
<b>Call:</b>	HORIZON-WIDERA-2021-ERA-01
<b>Start date of project:</b>	01.10.2022
<b>Duration:</b>	48 months
<b>Deliverable title:</b>	D7.2 Strategic alliances & Impact monitoring. 1 <sup>st</sup> Report
<b>Due date of deliverable:</b>	30.09.2023
<b>Actual date of submission:</b>	30.09.2023
<b>Deliverable Lead Partner:</b>	<b>Portia</b>
<b>Dissemination level:</b>	Public

Authors & contributors name and organisation	Role
Elizabeth Pollitzer, Portia ...	Lead author(s)
...	Contributor(s)
Lidia Arroyo Prieto, UOC Rachel Palmen, UOC	Quality assurance editor



The work contained in this document is subjected to a Creative Commons license (<https://creativecommons.org/licenses/by-nc-sa/4.0/>).



## Disclaimer

While INSPIRE is funded by the European Union, views and opinions expressed are, however, those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency (REA). Neither the European Union nor the European Research Executive Agency (REA) can be held responsible for them.

This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement No 101058537.

## Consortium

FUOC	Fundació per a la Universitat Oberta de Catalunya, Spain
JR	Joanneum Research Forschungsgesellschaft Mbh, Austria
SDU	Syddansk Universitet, Denmark
UJ	Uniwersytet Jagiellonski, Poland
Notus	Notus, Spain
FLACSO	Facultad Latinoamericana De Ciencias Sociales, Argentina
EM	Europa Media Szolgaltato Non Profitkozhasznu Kft, Hungary
Portia	Portia gGmbH, Germany
SRU	Stichting Radboud Universiteit
Fraunhofer	Fraunhofer Gesellschaft zur Forderung der Angewandten Forschung EV, Germany
UH	Universiteit Hasselt, Belgium
ZRC SAZU	Znanstvenoraziskovalni Center Slovenske Akademije Znanosti In Umetnosti, Slovenia
GESIS	GESIS-Leibniz-Institut für Sozialwissenschaften EV, Germany
INNO	Innosystems Symvouleutikes Ypiresies Kai Efarmoges Pliroforikis Ypsilis Technologias Monoprosopi Idiotiki Kefalaiouchiki Etaireia, Greece

### Document History

Version	Date	Summary of changes	Revised by
01	17.09.2023	Final draft	Elizabeth Pollitzer



---

02

22.09.2023 Text added

Lidia Arroyo  
Prieto

---



# 1 Executive Summary

Deliverable D7.2 is the first version to be produced in the series of three during the duration of the INSPIRE project. It outlines, explains, and summarises the actions taken to-date, in the approaches developed (to be later refined) to establish strategic alliances between INSPIRE - as a project and as a Centre of Excellence - and the various, relevant actor and stakeholder organisations in the European research and innovation ecosystem, who either have an expressed commitment or plans to integrate gender equality, diversity, inclusion and intersectionality perspectives and objectives into their mission. Integrating EDI values into institutional structures and practices, into the efforts towards development of human and intellectual capital, into transparent system of governance, etc., is increasingly recognised as a necessary step in the process of correcting the numerous biases and gaps in historical evidence, representations, and understandings of the biological and socio-cultural conditions that underpin studies of gender, ethnicity, race, age, social status, etc.

The strategy in INSPIRE is to: 1) help advance knowledge on **inclusive** gender equality; 2) establish shared understanding among science organisations of the concepts of 'inclusivity', 'diversity' and 'equality'; 3) contribute to the creation of an open and inclusive research and innovation environment; and 4) achieve systematic implementation of EUs commitment to gender equality in research and innovation, and in society. The INSPIRE consortium can build on the partners' extensive experience of collaborative projects whose goal was to promote gender equality in participation and representation; integration of gender dimensions in research process; and adoption of gender equality plans for structural improvements in organisational functions.



# 2 Table of Contents

- D7.2 Strategic alliances & Impact monitoring. 1<sup>st</sup> Report ..... 1
- 1 Executive Summary .....5
- 2 Table of Contents .....6
- 3 List of Acronyms .....7
- 4 List of Figures .....8
- 5 List of Tables .....8
- 6 Overview .....8
  - 6.1 Strategic Objectives for Stakeholder Alliances ..... 9
  - 6.2 Approaches to stakeholder engagement .....10
    - 6.2.1 Approach 1: Engaging with organisations already active in promoting EDI and with a record of cooperation with INSPIRE’s predecessor projects: GenPORT and ACT 10
    - 6.2.2 Approach 2: Mapping and identification of new strategic partners .....11
    - 6.2.3 Approach 3: Strategic alliances with other excellence centres and initiatives .....11
    - 6.2.4 Approach 4: EU institutions, businesses, and research organizations within and beyond Europe, with a focus on widening countries .....11
    - 6.2.5 Approach 5: Synergies with ERA Chair, Twinning and Teaming schemes .....12
    - 6.2.6 Approach 6: Establishing the INSPIRE Network of Strategic Alliances to support sustainability actions during, and after the project.....12
- 7 Planning Stakeholder Engagement through the series of Policy Workshops .....12
- 8 Plan for Stakeholder Participation in the 1<sup>st</sup> Policy Workshop .....14
- 9 Engaging stakeholders in the Re-imagining the Future Workshop.....16
- 10 Strategic Alliances to promote EDI in Research .....18
- 11 Progress in engagement of organisations in creating the INSPIRE strategic alliances. ....20



### 3 List of Acronyms

AB	Advisory Board
BuildERS	Building European Communities Resilience and Social Capital project
D	Deliverable
DoA	Description of Action
WP	Work Package

## 4 List of Figures

Figure 1 Expected outcomes and impacts of INSPIRE (from project proposal)

Figure 2 INSPIRE Theory of Change based on the [EFFORTI IOOI Model](#)

Figure 3 Interconnections between the three Policy Workshops

Figure 4 Planning the role of INSPIRE functioning as a Centre of Excellence

Figure 5 Expected understanding of EDI policy development process from 1<sup>st</sup> Policy Workshop

Figure 6 The design for knowledge and experience sharing activities

Figure 7 Participants sorting the categories of actors involved in promoting and preventing change

Figure 8 A framework for the strategic alliances focused on research quality and EDI

## 5 List of Tables

Table 1. Organisations already engaged in the INSPIRE activities

## 6 Overview

Deliverable D7.2 is the first version to be produced in the series of three during the duration of the INSPIRE project. It outlines, explains, and summarises the actions taken to-date, in the approaches developed (to be later refined) to establish strategic alliances between INSPIRE - as a project and as a Centre of Excellence - and the various, relevant actor and stakeholder organisations in the European research and innovation ecosystem, who either have an expressed commitment or plans to integrate gender equality, diversity, inclusion and intersectionality perspectives and objectives into their mission.

Integrating EDI values into institutional structures and practices, into the efforts towards development of human and intellectual capital, into transparent system of governance, etc., is increasingly recognised as a necessary step in the process of correcting the numerous biases and gaps in historical evidence, representations, and understandings of the biological and socio-cultural conditions that underpin studies of gender, ethnicity, race, age, social status, etc.





The strategy in INSPIRE is to: 1) help advance knowledge on **inclusive** gender equality; 2) establish shared understanding among science organisations of the concepts of ‘inclusivity’, ‘diversity’ and ‘equality’; 3) contribute to the creation of an open and inclusive research and innovation environment; and 4) achieve systematic implementation of EUs commitment to gender equality in research and innovation, and in society.

The INSPIRE consortium can build on the partners’ extensive experience of collaborative projects whose goal was to promote gender equality in participation and representation; integration of gender dimensions in research process; and adoption of gender equality plans for structural improvements in organisational functions. The partners’ extensive networks of science organisations provide a good start to create strategic alliances for achieving INSPIRE’s expected outcomes and impacts, see Figure 1.

Expected outcomes	Expected impacts
Advancement of knowledge, policy and practice on inclusive gender equality in research and innovation institutions across Europe, with an intersectional approach	A more open and inclusive research and innovation system; Increased alignment of strategic research with society needs, expectations and values; Greater quality of the scientific production and stronger translation of R&I results into the economy
Reduced disparities across Member States and strengthening of the European Research Area and its inclusiveness objective	Deepen the ERA

Figure 9 Expected outcomes and impacts of INSPIRE (from project proposal)

## 6.1 Strategic Objectives for Stakeholder Alliances

Creating strategic alliances is one in the range of key outputs that INSPIRE will produce. They are shown in Figure 2, which captures the Theory of Change of INSPIRE *as a project*. The Theory is based on the model developed by the EU EFFORTI project where change is represented as a process of moving from the Inputs to the Outputs, then to the Outcomes, and finally to the Impacts (IOOI).

The Theory of Change in Figure 2 shows the five expected outcomes in INSPIRE, which provide the strategic objectives of the stakeholder alliances, so that the aim is to engage different stakeholder whose interests and aims overlap one or more the goals below:

- a) Improving knowledge sharing and decision-making among practitioners
- b) Promoting an ecosystem-level consensus on EDI as a component of scientific excellence



- c) Improving integration of gender dimension in R&I projects
- d) Improving capacity of organisations to implement GEPs
- e) Establishing EDI values as the new norm in science practice

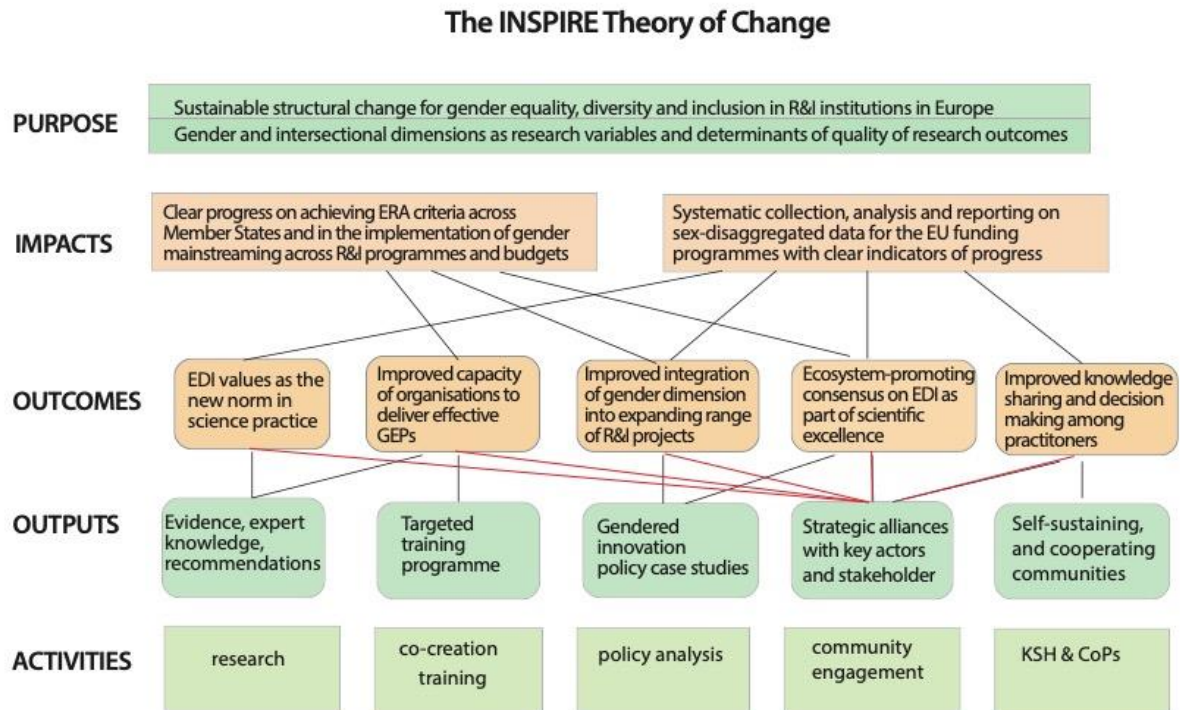


Figure 10 INSPIRE Theory of Change based on the [EFFORTLIOOI Model](#)

In the first year of the project, the focus has been on (a), (b) and (c) because this fitted well with the opportunities provided by the Re-imagining Future Workshop and the first in a series of three Policy Workshop.

## 6.2 Approaches to stakeholder engagement

### 6.2.1 Approach 1: Engaging with organisations already active in promoting EDI and with a record of cooperation with INSPIRE's predecessor projects: GenPORT and ACT

INSPIRE project builds on the work of GenPORT and ACT, which included networking and engagement activities with many and wide variety of organisations operating in research and innovation space who are actively promoting gender equality. These 'past collaborators' will



be mobilised to participate in the INSPIRE's planned activities, e.g., the re-imagining future workshop, dialogue series, and the conferences.

### 6.2.2 Approach 2: Mapping and identification of new strategic partners

With the current trend among science institutions to enhance participation and representation in science by combining gender equality, diversity, and inclusion (EDI), the new strategic partners will be those organisations that have adopted EDI policies and have created implementation plans, which they wish to share by connecting with others to learn from their experience and to collect good evidence on the needs and benefits as a way to improve practice.

Included in this group are organisations that operate in important areas of science enterprise (e.g., energy transition, research infrastructures) but who, so far, have not made specific efforts either to advance gender equality or EDI. Joining the INSPIRE strategic alliance will offer them a 'fast track' to filling in this gap.

Also included are organizations the partners identify in the D2.2 as party of the four country-cluster reports and Member States country information, and the D2.3. as party of populated database of stakeholders (organizations, persons).

### 6.2.3 Approach 3: Strategic alliances with other excellence centres and initiatives

A separate category of organisations targeted for engagement with INSPIRE are umbrella organisations that are influential in the science-policy ecosystem through their membership, who are part of the Horizon Europe institutional framework but who have not made visible efforts in promoting gender equality or EDI as part of their mission and activities (e.g., ALLEA, EARTO). These organisations may collect some data on gender balance among employees but not among the community they serve.

### 6.2.4 Approach 4: EU institutions, businesses, and research organizations within and beyond Europe, with a focus on widening countries

Examples of the key EU institutions in this category include EIGE, JRC, CEDEFOP, EURAXESS, EIC, EIT, EIB, EERA, European Communities and Council of Europe. In addition, INSPIRE can draw on the pool of more than 2000 organisations who reported on their efforts to advance gender equality or EDI a part of the past 23 Gender Summit events.



### 6.2.5 Approach 5: Synergies with ERA Chair, Twinning and Teaming schemes

This part of the alliance building will be described in the subsequent Deliverables when the details of the ERA Chair, Twinning and Teaming schemes become clear.

### 6.2.6 Approach 6: Establishing the INSPIRE Network of Strategic Alliances to support sustainability actions during, and after the project.

This part of the alliance building strategy will be covered in the subsequent Deliverables when the results produced by the different work packages will become available.

## 7 Planning Stakeholder Engagement through the series of Policy Workshops

The INSPIRE project will host a series of three Policy Workshops envisaged as a space for engaging stakeholders in the science ecosystem in a range of participatory knowledge sharing activities on EDI policy design, development, and implementation efforts, leading to:

- 1) Advancement of an ecosystem perspective on EDI as drive of excellence in R&I
- 2) Incorporation of EDI values as the new norm in science practice
- 3) Production of policy recommendations for the next EU GE Strategy.

Figure 3 captures the hierarchy of the existing structural mechanisms for advancing and monitoring progress on gender equality in the EU as a triangle with the commitment to gender budgeting at the top level occupied by the EU MFF commitment and the interventions at individual institution/discipline level at the bottom level. The figure also shows the different decision-making mechanisms at each level (e.g., the expert and policy advisory bodies) and the variety of existing indicator sets (e.g., She Figures, EIGE GEI) developed to monitor progress. The challenge for INSPIRE is how to add coherence to the gender equality efforts in R&I in the EU and enrich the outcomes by recognising diversity and inclusion as related and necessary objectives.

Each Policy Workshop is organised around a specific question for INSPIRE:

- PW1: What can we learn from the existing approaches to advancing gender equality and EDI in R&I by examining interventions, indicators, and the tools used for policy implementation in different contexts?
- PW2: How to support policy and decision-making actors in achieving coherences and systematic interventions toward gender inclusive R&I ecosystem?



- PW3: How can INSPIRE improve implementation and impact of inclusive gender equality policies in R&I?

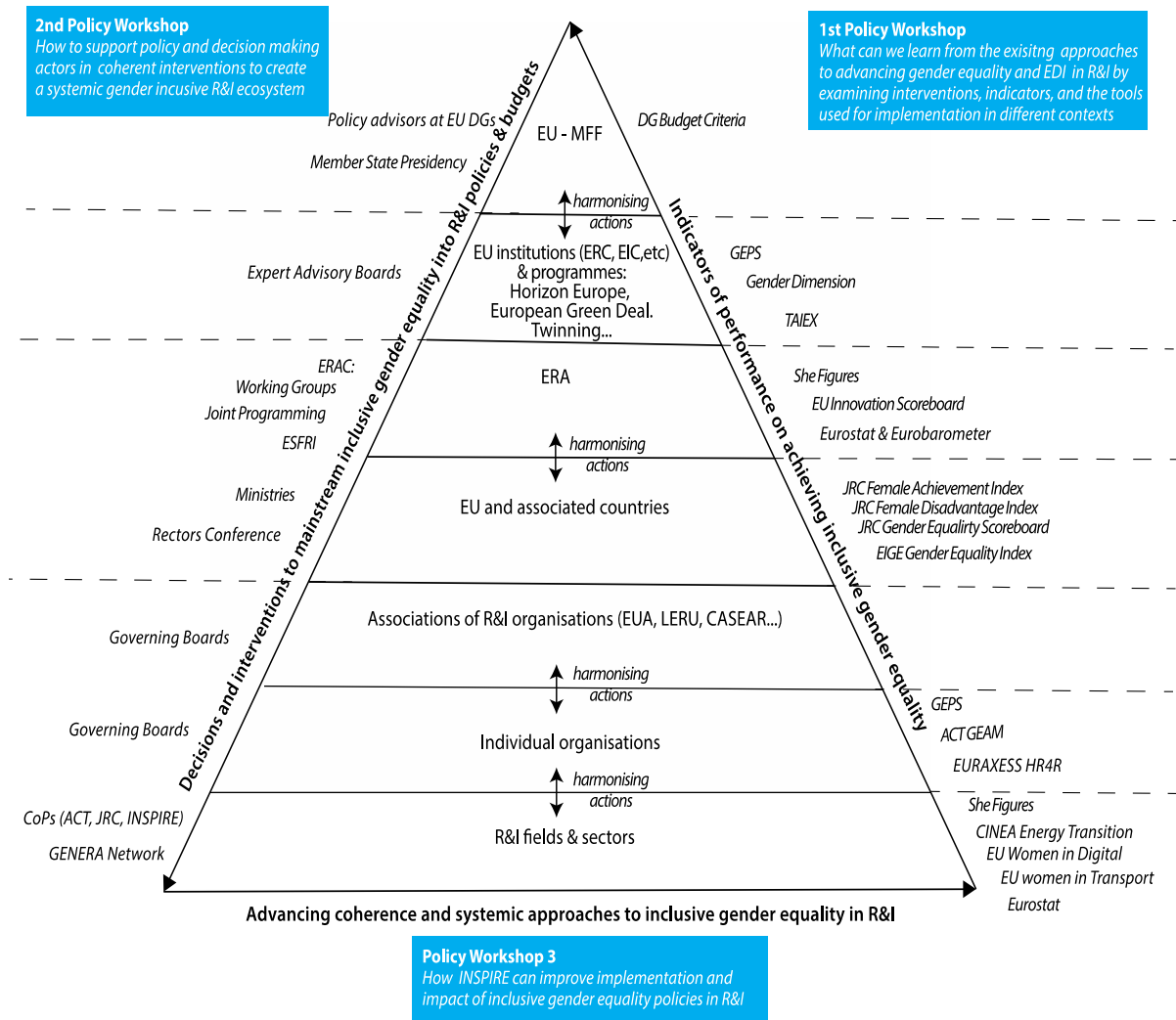
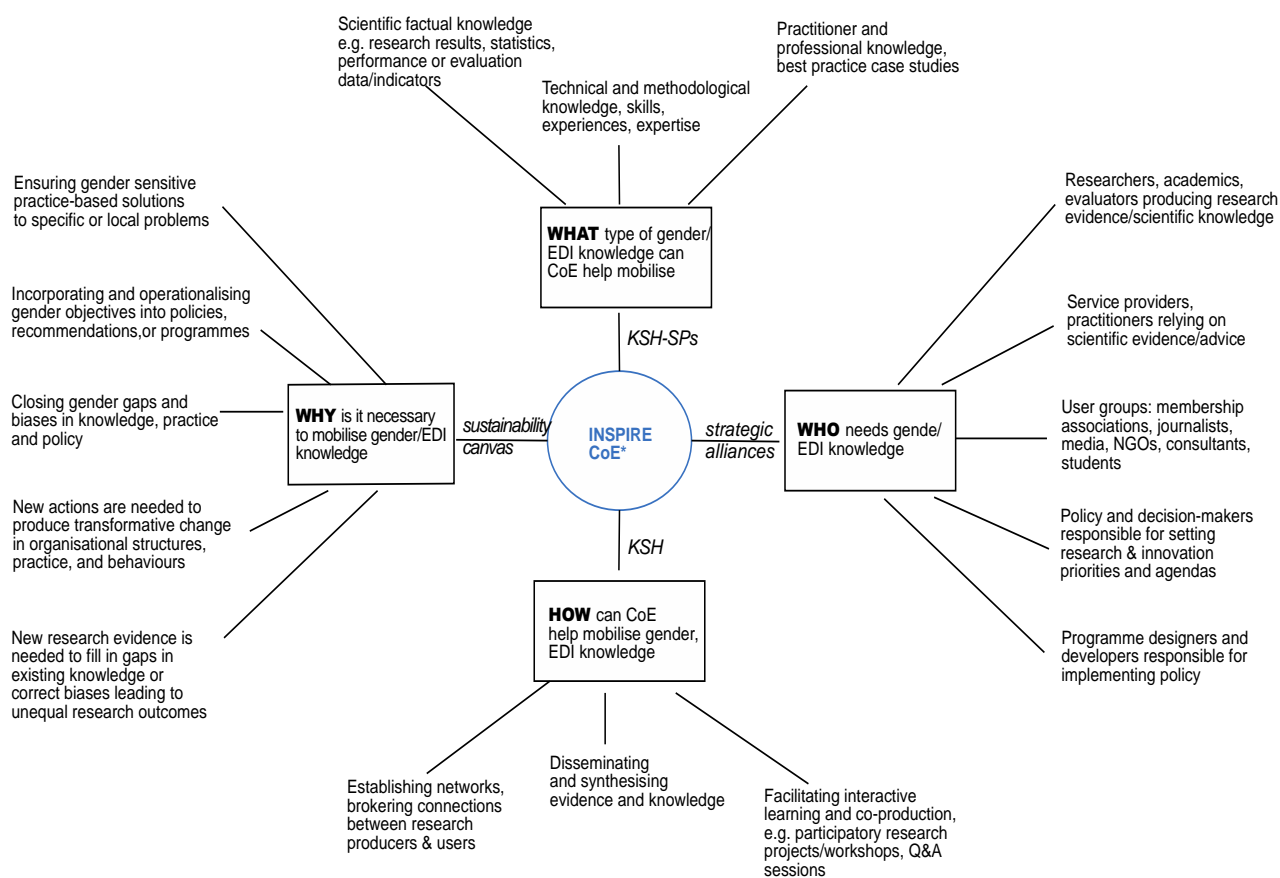


Figure 11 Interconnections between the three Policy Workshops



**\*Framework adapted from Ward, V (2017) Why, whose, what and how? A framework for knowledge mobilisers, Evidence & Policy, vol 13 no 3, 477-97, DOI: 10.1332/174426416X14634763278725**

Figure 12 Planning the role of INSPIRE functioning as a Centre of Excellence

The three Policy Workshops will provide information on how INSPIRE as a Centre of Excellence can help advance understanding and action promoting EDI, as summarised in Figure 4 above.

## 8 Plan for Stakeholder Participation in the 1<sup>st</sup> Policy Workshop

The selection criteria for inviting stakeholders to the first Policy Workshop were that:

- the organisation is an established R&I umbrella or association-type body,
- has a statement of commitment and a strategy to advance EDI, and



- has some way of establishing where change is needed and how to measure progress.

The organisations participating in the first Policy Workshop represent the “**pioneers**” in advancing EDI in R&I, and selected cases will be used share experiences, ambitions, and implementation processes to facilitate mutual learning through participatory activities that encourage reflections on how to support science institutions embarking on the EDI implementation journey. Figure 4 captures the important elements that underpin an implementation process: Why to do it?; Where action is needed?; What are the objectives?; How to turn objectives into practice?; Who should be involved?; When the results are expected?

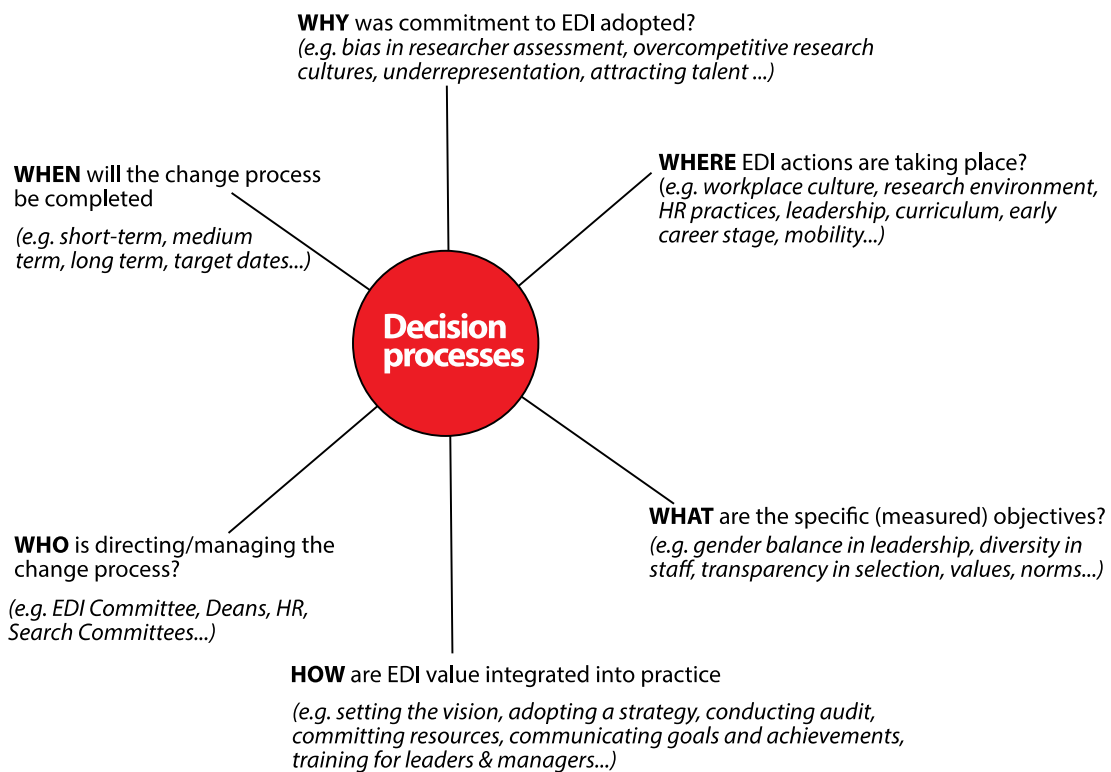


Figure 13 Expected understanding of EDI policy development process from 1<sup>st</sup> Policy Workshop

The mutual learning will focus on three topics and questions for INSPIRE:





**1. *What were the motivations and decision processes that have led each participating organisation to formulate a commitment to EDI?***

Question for INSPIRE: How can these experiences be used/adapted/communicated to help other organisations develop their own EDI strategy?

**2. *What are the perceived/experienced internal or external barriers that may prevent implementation and achievement of the desired objectives?***

Question for INSPIRE: What evidence/expertise is needed to support EDI implementation decisions and activities?

**3. *What are the EDI interlinkages between science, policy, and society that can promote comprehensive adoption of EDI values across science system.***

Question for INSPIRE: What kind of EDI actions could help promote adoption of EDI policies as driver for: i) inclusive excellence in science, ii) inclusive research environment, and iii) demonstration of societal relevance of science.

The stakeholders invited to participate in the first Policy Workshop are listed in Table 1 in the section on progress so far, which also list stakeholders who have participated in the Re-imagining the Future Workshop. The plan for inviting stakeholders to the future policy workshops is to bring in representatives from the different decision- and policy-making levels shown in Figure 3.

## **9 Engaging stakeholders in the Re-imagining the Future Workshop**

This workshop used the method of 'storytelling' where 'stories of change' from different stakeholders were used as a kick-off to imaging the future. The list of the participating organisations is included in Table 1. The insights into the participatory methods used are provided by the two images below.





### Creating Collective Overview (part 1)

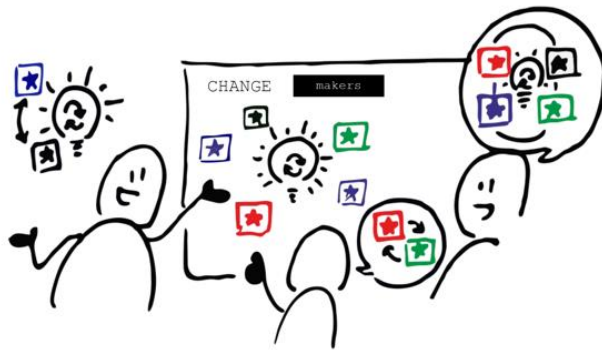


Figure 14 The design for knowledge and experience sharing activities

### *Establishing connections & overlaps between the change makers, breakers, keepers and indicators in the different stories*



Figure 15 Participants sorting the categories of actors involved in promoting and preventing change



## 10 Strategic Alliances to promote EDI in Research

Analysis of the existing EDI policies of the stakeholders invited to the first policy workshop has shown that in most cases the motivations and the designs were rooted in HR concerns and social justice arguments linked to underrepresentation issues, and that only a handful of organisations have made the connection to quality of research. This aspect will form a crucial concern for planning the next two Policy Workshops, as summarised in Figure 8.

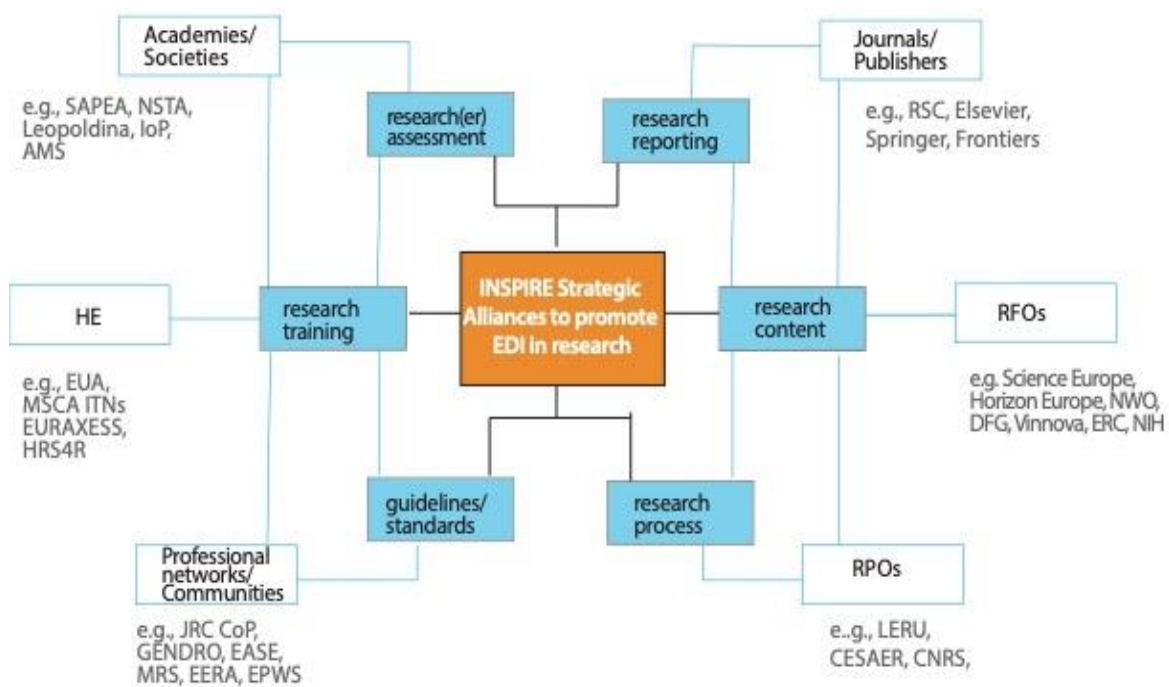


Figure 16 A framework for the strategic alliances focused on research quality and EDI.

To raise understanding and encourage stakeholders to also focus on EDI issues in research content and process itself, the INSPIRE project will deploy the A-Z Guides on gender dimensions and EDI in R&I developed by Portia for the Gender Summit platform for dialogue between scientists, gender scholars, policy makers and stakeholders in the science enterprise.



A few examples from Portia's A-Z Guide on EDI in R&I are listed below:

**Agricultural Systems** and the multidisciplinary, multi stakeholder, and inclusive approaches to improving selection of seeds, farming methods, marketing of products, etc. developed by the [Cornell University- Makerere University GREAT project](#).

**Artificial Intelligence** and the [recommendations from the World Economic Forum how AI can help advance equality, diversity and inclusion](#).

**BIG Science** and the initiative of the [EU Fusion for Energy agency to advance Women in Big Science](#) through the [Big Science Business Forum](#).

**Biodiversity** and the [Biodiversity Framework](#) which aims to achieve equity, justice and inclusive outcome in conservation measures on global scale.

**Cancer** and how [Cancer Research UK EDI Policy](#) targets funded research, researchers, research subjects, as well as the employees.

**Climate Change** effects and the [EU DG CINEA study on gender balance in energy transition R&I](#) that looks at the production and demand for talent and skills in the renewable and other energy sectors.

**DFG (German Research Foundation)** and their policy and strategy to advance gender equality and gender dimension in research.

**Department of Energy** efforts in the USA to advance equity, diversity, inclusion and accessibility.

**Energy transition** research that should [produce outcomes that are just fair and sustainable](#), according to the scientific advisers to the European Commission.

**Entrepreneurship** in science and the [Morehouse School of Medicine programme to provides under-represented students](#) with training to advance their careers in the biotechnology industry and/or start their own bio-ventures.

**FinTech** industry [whose future is threatened if it cannot engage the talent needed](#) to innovate and scale.

**Foreign Policy** and its gender dimensions as promoted across 47 countries in Europe by the Council of Europe in [participation of women and persons from multiple backgrounds in diplomatic careers, trade missions, peace operations, negotiations, and crisis management](#).

**Global Research Council's** efforts to [aggregate trends, practices, and experiences of GRC-participating organisations](#) regarding gender-disaggregated data and EDI.



**Global Health 50:50**, which regularly [assesses 200 organisations on their workplace policies, practices, and programmatic approaches in support of gender equality](#) to fast-forward the pace of change to make global health more gender equal.

## 11 Progress in engagement of organisations in creating the INSPIRE strategic alliances.

Listed in the table below are organisations that have already been engaged in INSPIRE activities. In the next version of this Deliverables will be added organisations that have been identified as part D2.2 “4 x Country-cluster reports, Member States country information” and the “D2.3. Populated database of Stakeholders (organizations, persons)”.

<b>Organisation that participated in the re-imagining the future workshop, 19 April 2023</b>	<b>Organisation invited to participate in 1<sup>st</sup> Policy Workshop, 6 October 2023</b>
EIC	Science Europe
Elsevier	NordForsk
ERC	DFG
Science Europe	Cancer Research
U. Oxford	EUA
Council of Europe	EUI
GENDRO	Advance HE
European Parliament	RCR
Robert Bosch Foundation	CESAER
LERU	EMBL
HEA Ireland	FRQ Canada
RSC	EIGE



EUA	SAPEA
CERRI	JRC
GENDER Action+	ERC
Euratech	UKRI
EuroDoc	Elsevier
EVAConsult	RSC
PRIMA	EIC
Technopolis	Wellcome
W-STEM	EuroDoc
OECD	Empirica
DLR	GENDRO
MOVES	NOW-I
	ALLEA
	Gender in Medicine
	EERA
	RAEng
	HEA Ireland
	STM
	GENERA
	NIKK
	CERRI
	FFE



	GENDER Action+
--	----------------

## Disclaimer

While INSPIRE is funded by the European Union, views and opinions expressed are, however, those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency (REA). Neither the European Union nor the European Research Executive Agency (REA) can be held responsible for them.



This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement No 101058537.



The work contained in this document is subjected to a Creative Commons license (<https://creativecommons.org/licenses/by-nc-sa/4.0/>).

Please visit <https://www.inspirequality.eu>