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INSPIRING ERA

REPORT

INSPIRING ERA EXCHANGE hybrid event on ERA ACTION 5

How to overcome barriers to collecting and analysing data on inclusive and intersectional gender equality in the R&I system for monitoring and evaluation?

Brussels, 6th June 2025

Introduction: INSPIRING ERA consortium in collaboration with the European Commission and other stakeholders held an event on ERA Action 5 “Promote gender equality and foster inclusiveness”. The topic was overcoming the barriers to collecting and analysing data on inclusive and intersectional gender equality. The INSPIRING ERA Exchange (IEE) took place on June 6, 2025, at the NCBR office in Brussels in a hybrid formula.

Context: The primary focus of the structural policy focused on inclusive and intersectional gender equality within the forthcoming ERA Policy Agenda is the establishment of robust monitoring and evaluation frameworks. This encompasses several critical areas, including inclusive Gender Equality Plans (GEPs), intersectionality, gender dimension in R&I content, gender mainstreaming of ERA actions, gender budgeting and expenditures tracking.
The availability and quality of data in these areas is crucial, as is the development of reliable data collection systems that can provide accurate and comparable information to inform policy decisions, monitor progress and identify areas for improvement.
The IEE event was organised as a back-to-back event to the meeting of the subgroup on inclusive gender equality in the ERA, which was very helpful in bringing top national experts together.

Objectives of the event: The primary objective of the event was to facilitate mutual learning, collaboration, and knowledge-sharing, with a view to identifying effective strategies for overcoming barriers to collecting and analysing data on inclusive and intersectional gender equality for monitoring and evaluation. By bringing different stakeholders, both during the panel session and the breakout session the IEE was focused on confronting diverse perspectives and approach the topic from different angles. The idea behind it was to spark the discussion as the opening of the three-year-long process aimed at developing a relevant policy document.

Attendees: The event gathered over 20 attendees in person and ca. 30 online, mainly policy advisors of the national level, university experts, projects managers, equality project officers and other stakeholders.

Methodology: Maciej Woszczyk from the National Centre for Research and Development (NCBR) delineated the INSPIRING ERA project, including the concept of INSPIRING ERA Exchange and together with a colleague, Iwona Klich-Królikowska also moderated the event. During the plenary session presentations were delivered by the leading researchers on this subject, Jörg Müller (University Oberta de Catalunya, project INSPIRE) and Anne Laure Humbert (University of Gothenburg, project GenderSAFE) followed by Anu Ritz, the EC representative from DG JUST. The breakout session carried out in 4 groups was followed by a wrap-up block.

Content: The Müller’s speech highlighted the fact of the underlying masculinity and masculinity-driven values and culture while addressing the problem of inclusiveness and intersectionality. Approaching the issue of data collection and monitoring from intersectional perspective sometimes tends to ignore this key factor. Müller proposed focusing on the structural inequalities instead of social identities or social categories and put an emphasis on the masculine context, to be tracked downed in the hierarchy of power (translating into hierarchy of oppression and privilidge) - as the central category of social panorama affecting social perspective. Thus, data collection and monitoring in intersectionality, should also factor that in, as well as purpose of the data collection.

However capturing the intersection is not additive, as the experiences are qualitatively different, the Humbert’s presentation underscored the importance of applying quantitative

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intersectional methods – particularly the MAIHDA (Multilevel Analysis of Individual Heterogeneity and Discriminatory Accuracy) approach – to better capture the complex and structural nature of inequalities, especially in the context of gender-based violence in research institutions. The key idea behind this alternative approach is that individuals may show similar experiences with their intersectional membership group. Just like two individual experiences may be shaped by living in the same geographical area, intersectional multi-level modelling acknowledges that experiences may also be similar among people that share the same sets of characteristics.

Using data from the UniSAFE survey, which gathered over 42,000 responses across 15 countries, the analysis demonstrates how intersectional multilevel modelling can reveal nuanced patterns of vulnerability linked to intersecting identities and contexts (e.g., gender, role, country, institution). Moving beyond descriptive analysis, the presentation calls for more advanced approaches such as mediated moderation and contextual intersectional modelling to uncover causal mechanisms behind inequalities—ultimately bridging the gap between intersectionality theory and quantitative practice.

Last speaker, by Anu Ritz from the EC, outlined critical guidance for EU Member States and stakeholders on how to collect and use equality data—including sensitive data such as racial or ethnic origin and sexual orientation—in full compliance with the General Data Protection Regulation (GDPR) and national data protection laws.

The core message emphasizes that data protection rules do not prevent equality data collection, but instead provide a framework that upholds individuals' rights while enabling legitimate statistical, research, and policy uses. The presentation stresses the need for strict adherence to GDPR principles such as lawfulness, fairness, transparency, data minimisation, and purpose limitation, especially when processing special categories of data.

Overall, the presentation stressed that with the appropriate safeguards—such as explicit consent, legal bases for processing, and anonymisation—it is both legally and ethically feasible to collect meaningful equality data that can inform inclusive policy across the European Research Area.

Summary of Breakout Groups

The breakout session was carried out in 4 groups, 2 online and 2 onsite - each of them was facilitated by an INSPIRING ERA consortium representative. The following guiding questions were formulated to spur and structure the exchange:

- What data on inclusive gender equality in research and innovation is collected at your national or organisational level?
- What issues or aspects do you consider to be the most challenging in terms of their collection, and what solutions would be ideal or feasible?
- What good practices can you share with others?

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Summary of the group 1

Challenges:

- **Small sample sizes** in small organisations make it difficult to collect meaningful, disaggregated equality data without compromising confidentiality, especially on sensitive variables (e.g. age, job title, gender identity).
- **GDPR compliance** is often misunderstood or used as an excuse not to collect equality data, especially for intersectional or identity-based categories.
- There is a **disconnect between data collection and action**; data often exists but does not lead to structural or cultural change.
- **Intersectional data** remains limited or missing, particularly in under-resourced regions (e.g. Southeast Europe) and in emerging domains like gender in spinouts or alternative STEM careers.
- **Cultural resistance** persists – data alone does not change persistent norms or power structures; diversity efforts can be seen as conflicting with notions of "excellence".
- **Invisibility of marginalised identities** in surveys and institutional systems leads to exclusion (e.g. no box to tick for certain identities).
- **Structural barriers** such as childcare needs, visa restrictions, or limited mobility funding disproportionately affect women and other underrepresented groups.

Solutions:

- Use **flexible and anonymised approaches** in small organisations, such as voluntary surveys, data decoupled from decisions, and simplified questionnaires.
- **Adapt survey language** to focus on lived experiences (e.g. safety, microaggressions) rather than rigid categories like "discrimination".
- Leverage the **advantages of small size** for inclusive participation and rapid iteration of tools.
- Develop **access schemes and short-term mobility programmes** to foster inclusion and networking, particularly for women and early-career researchers.
- Ensure **dedicated funding** not just for data collection but for **analysis, dissemination, and impact activities** (e.g. UK's Impact Accelerator grants).
- Advocate for **system-level capacity-building** in under-resourced regions and institutions.
- Support policies that enable **inclusive mobility**, including revisiting visa and funding eligibility criteria for researchers with caregiving responsibilities.
- Use storytelling and narrative approaches to **connect data to culture**, challenge dominant discourse, and show the **value and necessity of EDI** work.

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Key takeaways:

- Collecting meaningful equality data is possible **within GDPR constraints**, but requires **clear purpose, careful design, and institutional support**.
- **Intersectional thinking must be embedded** in both data systems and policy design, even where numbers are small.
- **Culture change is the real challenge** – data must be used not only for reporting, but to challenge and reshape norms, especially within male-dominated or hierarchical settings.
- Building a truly inclusive European Research Area requires **bottom-up engagement**, but also **top-down policy support**, **funding mechanisms**, and **political will**.
- **Data collection is not the end goal** – it must be followed by action, accountability, and sustained engagement to transform research cultures and structures.

Summary of the group 2

Challenges:

- **Capacity & Systematic Approach**
  - Ireland: Limited institutional capacity and small sample size hinder comprehensive benchmarking. Need for a more systematic approach to data analysis.
- **Sensitive Data Collection**
  - France & Sweden: Legal and political restrictions prevent the collection of ethnicity and racial origin data.
  - Sweden: Politically sensitive to ask for certain data (e.g., on ethnicity, sexual orientation); voluntary data cannot be used for funding decisions.
- **Low Participation & Trust**
  - Ireland & Portugal: Low response or disclosure rates, especially regarding ethnicity.
  - General: Trust issues reduce willingness to share sensitive data, especially when identities are not accurately represented (e.g., non-binary gender options).
  - Underrepresentation of vulnerable groups remains a consistent issue across countries.
- **Data Fragmentation and Lack of Intersectionality**
  - Countries like Poland lack intersectional analysis, though it's planned.
  - Norway and others need to work with multiple datasets due to unavailability of integrated or specific variables (e.g., no data on sexual orientation).
- **Overresearch on Gender, Gaps Elsewhere**
  - Extensive gender data exists, but limited information on other socio-demographic groups such as Roma communities.

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Solutions:

- National Monitoring Frameworks
    - Ireland: Implemented a tailored ATHENA Swan process with peer review, 5-year Gender Equality Plans (GEPs), and benchmarking based on 8 key recommendations.
    - Use of online systems to collect and monitor data.
- Proxy Data Collection
    - France & Sweden: Where direct collection of sensitive data is restricted, proxies like parents' country of origin are used.
- Voluntary Disclosure Campaigns
    - Anti-racism plans in development include awareness campaigns and encouragement of voluntary data sharing on race/ethnicity (though effectiveness yet to be evaluated).
- Targeted Calls for Inclusion
    - Sweden: Launching targeted calls for proposals focused on social inclusion and intersectionality to address data and action gaps.
- Experience Sharing and Networking
    - Seminars and peer learning to share good practices and amplify voices of ethnic minorities.

Key Takeaways:

- **Systematic and long-term frameworks (like Ireland's ATHENA Swan process)** can enable progress, even with limited resources.
- **Trust and representation** are foundational for successful data collection – surveys must reflect respondents' identities to foster participation.
- **Legal and cultural contexts matter**: Approaches to data collection need to adapt to national political climates and legal constraints.
- **Intersectionality remains aspirational** in many contexts due to data gaps – more comprehensive socio-demographic data is necessary.
- **Voluntary campaigns and awareness-raising** may support progress but require evaluation to determine their impact.
- **Collaboration, benchmarking, and peer review** can identify common difficulties and drive national-level improvements.

Summary of the group 3

Challenges:

- Small Sample Sizes and Anonymity Concerns
    - In small organisations or teams, even sharing job titles can identify individuals, preventing collection of sensitive but meaningful data.
    - GDPR is often interpreted restrictively, discouraging data collection, especially in under-resourced areas like Southeast Europe.

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- **Lack of Systematic and Intersectional Data**
    - University data systems are not well-developed for capturing intersectional or demographic data.
    - Spin-out data (e.g. women-led innovation) is not being systematically gathered, despite its importance for inclusive innovation.
- **Structural Inequalities in R&I Systems**
    - Historically underfunded regions face large data gaps and limited capacity to collect or analyse data.
    - Lack of gender-sensitive support (e.g. mobility programs without child care) can indirectly exclude women from career opportunities.
- **Missed Opportunities for Impact**
    - Data collected in projects often lacks follow-up: it's not used to create societal impact or inform policies after the end of the funding period.

Solutions:

- **Anonymising Sensitive Data**
    - Replace job titles with anonymised grading scales (e.g. grade 1-6 by seniority) to enable data collection without breaching confidentiality.
- **Better Survey Design**
    - Focus on asking about specific experiences rather than abstract questions on "discrimination".
    - Constantly update language in surveys to ensure inclusivity and relevance.
- **Clearer GDPR Guidance from the European Commission**
    - The EC should clarify what GDPR does not prohibit, helping organisations understand where data collection is allowed.
- **Capacity Building Across Europe**
    - Fund and support systematic, harmonised data collection infrastructures across all Member States—especially in regions with existing gaps.
- **Recognising New Data Sources**
    - Create registers and collect data on female-led spin-outs, an underexplored area with significant potential for promoting gender equality in innovation.
- **Gender-sensitive Mobility and Networking**
    - Fund short-term, flexible mobility programmes (e.g. internships) that are accessible to women, with childcare support to ensure equal participation.
- **Post-project Impact Funding**
    - Introduce impact accelerator grants or "impact add-ons" after research projects end, allowing for analysis, dissemination, and policy translation of the data collected.

Key Takeaways:

- **Small numbers are both a challenge and an opportunity**: while anonymity concerns limit data collection, smaller communities can foster more open discussions.
- **Lack of intersectional, innovation-related, and gender-disaggregated data** is a key bottleneck to effective structural change.

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- **Policy guidance, funding, and flexibility** from the European Commission and Member States are essential to enable meaningful and ethical data collection and use.
- **Collecting data is not enough** — it must be **analysed, translated, and acted upon** to produce real societal and institutional change.
- **Inclusivity in mobility and innovation ecosystems** requires not only funding but also practical considerations like childcare and accessibility, especially for women.

Summary of the group 4

Challenges:

- Lack of Intersectional Data
    - Despite long-standing gender equality plans (e.g., since 2007), intersectionality is still not integrated in many institutions' data systems.
    - Small, homogenous university populations reduce perceived urgency to collect and address diversity data.
    - Sensitive variables (e.g., ethnicity, religion, disability, gender identity) are often uncollected due to legal or cultural barriers (e.g., Spain's Gitano community, France's data protection laws).
- Inconsistent Definitions and Reporting Standards
    - Lack of common criteria for reporting (e.g., sexual harassment cases vary in how they are defined and counted).
    - National legal differences prevent unified definitions across EU Member States, making comparisons and common frameworks difficult.
- Limited Institutional Capacity
    - Smaller research institutes face structural barriers: low numbers hinder statistical validity for intersectional analysis.
    - Many institutions have no regular surveys to track workplace culture or gender-based violence (GBV).
- Data Skepticism and Cultural Resistance
    - Even when survey data is available (e.g., on student well-being or sexism), low response rates are used to discredit the findings.
    - Resistance from senior staff or lack of awareness about survey methodology reduces institutional commitment to data-driven action.
- Fragmentation of Efforts
    - Benchmarking attempts often fail due to inconsistent indicators, lack of harmonised data collection practices, and divergent administrative cultures (especially between universities and research institutes).

Solutions:

- Regional Coordination and Common Grids
    - Catalonia's inter-university council (12 universities) coordinated by the regional government provides a platform for collaboration.
    - Joint efforts led to the development of a common analysis grid for GBV cases, standardising definitions, terminology, and reporting.

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- **Flexible, Bottom-up Collaborations**
    - Research institutes self-organised to share good practices, benchmark internally, and build trust-based exchange, particularly helpful for smaller institutions.
- **Broader and Inclusive Understanding of Intersectionality**
    - Recognise and include less visible dimensions like mental disability, age, LGBTIQ+, and career stage.
    - Consider pooling data across institutions to enable more meaningful intersectional analysis where individual sample sizes are small.
- **Surveys as a Tool for Culture Change**
    - Regular, standardised surveys (e.g., GBV, work environment) recommended as a condition for funding – a potential role for the European Commission.
    - These surveys can be tailored but should align with common EU-wide templates to ensure comparability and credibility.
- **Leverage External Pressures to Drive Change**
    - Media scrutiny (e.g., journalist inquiries about harassment cases) served as a trigger for institutional reform, pushing universities to develop structured responses.

Key Takeaways:

- **Intersectionality is still emerging** as a priority in gender equality plans and requires both conceptual clarity and practical tools.
- **Common data frameworks** at the regional level (e.g. in Catalonia) can significantly improve reporting consistency and accountability.
- **Smaller institutes face unique barriers**, but also offer agility for piloting innovative approaches through bottom-up networks.
- **Surveys must be normalised** as part of institutional practice – and supported through training, communication, and clear frameworks.
- **European-level action** (e.g., EC clarifying expectations, funding surveys, incentivising data collection) is crucial to harmonise efforts across diverse legal and cultural contexts.

Concluding remarks :

The event highlighted a shared commitment across stakeholders to strengthen inclusive, evidence-based policymaking in research and innovation through improved equality data collection. Speakers underscored the importance of going beyond identity labels to address the structural and cultural dimensions of inequality – particularly those shaped by dominant masculine norms embedded in research institutions. Quantitative innovations such as MAIHDA were presented as promising tools to capture complex intersectional realities, while ongoing challenges – such as legal constraints, small sample sizes, and cultural resistance – were acknowledged across national and organisational contexts.

Overall, the discussions reinforced that collecting equality data in line with GDPR is both legally feasible and ethically necessary when guided by clear purpose, trust, and institutional responsibility. The way forward lies in combining robust methodologies, supportive policy frameworks, and a cultural shift that recognises data as a tool not only for diagnosis but also for transformation. Meaningful change will depend on sustained collaboration between researchers, institutions, policymakers, and communities.

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