

Gender Equality in Academia and Research

Data collection and monitoring

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Gender equality plans (GEPs) or any other gender equality ad hoc initiatives need to be grounded in evidence. Before you can plan any measures, you need to know **how your organisation is doing regarding gender equality** and which areas you need to focus on. This initial assessment of the status quo of gender equality in an organisation usually includes a statistical analysis of sex-disaggregated data, additional interviews or focus groups (qualitative methods) to gain a better understanding, a documentary analysis of national legal and policy documents, and a review of your organisation's strategic and operational documents. Go to [step 2 of the step-by-step guide](#) for details on how to carry out the status quo assessment in your organisation.

Based on your status quo assessment, you will establish specific, measurable, attainable, realistic and time-related (SMART) objectives, targets and measures for your GEP (see [step 3 of the step-by-step guide](#)). However, the data collection does not end here: to be **eligible for Horizon Europe**, it is mandatory that **organisations collect and publish disaggregated data on the sex and/or gender of personnel** (and students, where relevant) and carry out annual reporting based on indicators. Hence, a regular monitoring plan and a final evaluation of your GEP needs to be implemented. The latter will help you to learn relevant lessons for future measures.

This section of the action toolbox will provide you with examples of how other organisations conducted their monitoring and evaluation, as well as some additional tips. See [step 5 of the step-by-step guide](#) for details on how you can plan and implement a monitoring and evaluation strategy. Note that the direct links will lead you to the step-by-step guide for research organisations, universities and public bodies; there is a separate guide for [research funding organisations](#) [↗](#).

Get some tips on what to consider when implementing measures

Consider the following notes on data collection and analysis in the context of planning and implementing your GEP.

Plan your monitoring and evaluation strategy at the very beginning. Starting with your initial status quo assessment, consider which areas to focus on and set out measures in your GEP. When planning the details of your GEP, consider in which way you will monitor progress and evaluate the impact of your measures. You may want to embed your monitoring and evaluation strategy in a [theory of change](#) , so that it supports a structured understanding of how and why you think your planned measures will contribute to change in your organisation.

While baseline data and information (as collected during the initial status quo assessment) are necessary as input for tailoring a context-sensitive GEP, it is good not to spend too much time just collecting and analysing information. If necessary, complementary analytical efforts can still be undertaken when concrete activities have started already.

Gender-sensitive and gender-specific indicators are key to measuring gender-related changes over time. They can be quantitative (e.g. numbers of women and men researchers), or qualitative (usually used to capture/assess people's experiences, opinions, attitudes, behaviours and feelings). While quantitative indicators can provide statistical evidence of what has changed, qualitative analyses allow the quality of change to be assessed and help you understand why certain patterns have occurred. The best way to capture the status of gender (in)equality in the organisation and to assess progress is by **combining the use of quantitative indicators with qualitative ones** (see [step 5](#) for concrete suggestions).

Remember that 'women' and 'men' are very heterogeneous groups and that differences in the situations of individuals within these groups might be significant. Pay attention to **intersecting inequalities** and the influence of other factors (such as age, career stage, family status, contractual basis). Try to consider at least three **gender categories** when collecting your data, for example woman, man and non-binary (or gender-diverse). Furthermore, it is important to realise that monitoring and evaluation are very important for the **accountability, but also the visibility**, of your measures. Make sure to **communicate** your results to relevant stakeholders regularly and use the data to ensure their support.

In order to get more detailed information and guidance on data collection and monitoring, check out the resources provided in the **tab 'Tools and resources'**.

Get inspired by what other organisations have implemented

Here are some **examples of measures** implemented in other organisations (note that they will open in a new window):

gender balance report, National Research Council, Italy,
gender pay gap audit and elimination, Vilnius Academy of Arts, Lithuania,
monitoring equal opportunities, Austrian Science Fund (FWF), Austria,
the Observatory of Research and Scientific Careers of the Fund for Scientific Research (FRS-FNRS), Belgium.

You can find further inspirational examples in the following sources:

the European Institute for Gender Equality (EIGE) provides a section on [good practices](#) for various relevant topics;
these sustainable measures were already mentioned in the first version of the gender equality in academia and research (GEAR) tool and are still in place.

If you want to learn more about how you can adjust these measures for your own purposes and how to implement them through a GEP, read the step-by-step guide for [research organisations, universities and public bodies](#), or the step-by-step guide for [research funding organisations](#).