INSPIRE

D2.4 Strategic guidance & quality assurance

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SDU	Syddansk Universitet, Denmark
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Executive Summary

This document intends to build strategic guidance for INSPIRE research and support work, including guiding principles of feminist research & pedagogy, open science/innovation, decolonial approaches to knowledge production on GE in Europe. It will set the internal and external quality standards & assurance and define ethics requirements for: stakeholder/CoP involvement/ recruitment, research activities, deliverable review process, training units & support packages.

The deliverable is divided into five sections. Section 1 lays out the guiding principles, values and relevant concepts as applicable to the INSPIRE project: Gender mainstreaming, Intersectionality, Feminist pedagogy and epistemology, Diversity and inclusivity, Decolonial approaches to knowledge production, Critical approaches to the EU gender equality politics and policies, Open science, and Ethic and research integrity. These guiding principles are the foundations for the practical guidelines for different project activities as set out in Section 2, which provides guidelines organised into clusters addressing groups of similar activities within different tasks to be conducted within the INSPIRE project. These are: (1) tasks involving data collection and accumulation of existing knowledge; (2) tasks involving research and creation of new knowledge; (3) tasks involving creation of applicable tools and products; (4) tasks involving interaction with external experts and beneficiaries; (5) tasks involving knowledge exchange and dissemination; (6) tasks involving event organisation; (7) tasks involving writing reports, deliverables, analyses, and other textual outputs.

Section 3 outlines principles underlying the publication strategy of the INSPIRE project and offers guidelines covering both the research results planned to be published as part of the INSPIRE project, and other publications that might use the outcomes of the research and activities conducted as part of the INSPIRE project. Finally, Section 4 outlines Quality Assurance protocols and offer basic guidelines for the project deliverables to be followed by the Quality Assurance Editors (QAEs) in the process of reviewing INSPIRE deliverables. Finally, Section 5 provides a list of references to publications used in this deliverable.

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List of Acronyms

AB	Advisory Board
CtD	Contributors to the Deliverable
D	Deliverable
DoA	Description of Action
EDI	Equality, Diversity and Inclusion
GEP	Gender Equality Plan
LPD	Lead Partner of the Deliverable
PI	Primary Investigator
PC	Project Coordinator
QAE	Quality Assurance Editor
T	Task
WP	Work Package

1 Guiding Principles, Values and Relevant Concepts

An important goal of the INSPIRE project is developing an approach that is able to challenge one-directionality in knowledge production and consider different historical and social contexts, genealogies of knowledge, legacies, and languages. Such an approach considers gender equality as a value that is inseparable from broader ethical principles and organisational culture promoting inclusivity, diversity, equal opportunity for all involved people, regardless of their gender, race, origin, social background, sexual orientation, gender identity or gender expression, disability, structural position in the hierarchy, and power relations. Not least, it aims to observe gender relations and equality intersectionally, since these cannot be separated from other characteristics defining individual's possibilities and social positions, such as race, social background, language, age, etc.

This deliverable's aim is to provide concrete guidelines for INSPIRE partners' research and support work that builds on such reflexive, intersectional, ethical, and inclusive approach to gender equality.

This section lays out the guiding principles, values and relevant concepts which are applicable to the INSPIRE project, and serve as foundations for the practical guidelines for different project activities as set out in the Section 2.

1.1 Gender mainstreaming

The concept of gender mainstreaming emerged first within public policy realm as a principle that all policy actions and legislation should be assessed through implications it has for people of different genders. Gender mainstreaming involves ensuring that gender perspective and goal of gender equality are considered in all policy related activities: analysis and policy development, planning and budgeting, implementation and monitoring of programmes and projects (UN.ORG).

In accordance with the Grant Agreement, "the beneficiaries must take all measures to promote equal opportunities between men and women in the implementation of the action ... They must aim, to the extent possible, for gender balance at all levels of personnel assigned to the action, including at supervisory and managerial level" (Annex 5, p. 3).

This principle applies to the organisation of all tasks planned by the INSPIRE project.

In addition, gender mainstreaming as a concept also includes **integrating the gender dimension into the content of research and innovation**. Gender-sensitive research takes into account the differences between genders in all aspects of the research, from an initial idea, formulating research questions, objectives and methodologies to the outcomes and presentation of results.

Gendered innovation is an approach to "gender-responsible science and technology development by employing practical methods of sex, gender and intersectional analysis (Karaulova et al. 2023, p. 36). Detailed discussion of the gendered innovation as it is applied in current research is provided in INSPIRE report on literature review relating to this topic (D2.1 KSH4, Karaulova et al. 2023). In this document authors provide a definition of the key concept:

> **Inclusive gendered innovation** (IGI) mainstreams sex, gender and intersectional analysis in the R&D and innovation development processes aiming at promoting inclusive gender equality. The IGI approach considers how broader societal influences, such as unconscious bias, gender relations, and intersecting inequalities already present in institutional frameworks and organisational structures, as well as local context, affect innovation development and innovation beneficiaries. IGI involves a diverse group of beneficiaries in the innovation process. While intersectionality should be an aspirational goal of IGI, it may be difficult to realise empirically. In these cases, IGI should strive for an inclusive approach grounded in sex, Gender and diversity analysis Karaulova et al. 2023, p. 45).

1.2 Intersectionality[1]

Intersectionality is a theory that originated from Black Feminism and Critical Race Theory. It stresses the need to include the experiences of women of colour who were excluded from essentialist white feminist and anti-black discourses (Crenshaw 1989; Collins 1990; hooks 1981). Coined in 1989 by US legal scholar Kimberlé Crenshaw, it has since then travelled beyond geographical contexts and among disciplines such as the study of (public) policies.

Intersectionality as an approach takes into account various forms of discrimination and overlapping social identities. Although gender is often a ground for discrimination, it usually cannot be detached from other, multiple forms of discrimination (Rolandsen Agustín 2013). Such an approach is needed in order to identify "the people with multiple marginalisations who face the most systemic barriers" (Towards gender equality in the cultural and creative sectors, p. 117). The relevance of an intersectional approach, however, goes beyond the detection of multiple, intersecting inequalities and forms of discrimination. It highlights the ways in which inequalities such as racism, classism, sexism, trans- and homophobia, ableism, etc. are mutually constitutive and cannot easily be tackled by siloed policy measures focusing on one form of discrimination at a time (Christoffersen 2023).

As Walby, Armstrong and Strid (2012, p. 451) emphasise, many authors have stressed the importance of addressing the issue of multiple discriminations and inequalities in both gender theory (Choo and Ferree 2010; Crenshaw 1991; Hancock 2007; McCall 2005; Walby, Armstrong and Strid 2012) and in the analysis of equality policy (Lovenduski 2004, 2005; Kantola & Nousiainen 2009; Squires 2009; Verloo 2006). Despite an extensive work on conceptualising intersectionality, there is little consensus on how to apply an intersectional approach to equality policies (Rodriguez et al. 2016). The main critique comes from scholars who condemn the single or additive approach of diversity, equality and inclusion policies and

[1] Authors acknowledge significant contribution of Joanna Beeckmans (UH) in developing this section.

want to move towards an integration of intersecting inequalities on an individual and structural level (Atewologun 2018; Christoffersen & Emejulu 2022).

On an individual level, it is essential for a more general understanding of the lived experiences of marginalised social and political subjects, their reality, interests and needs, and necessary in understanding the agency of social subjects who face intersecting inequalities and the ways in which alliances or competitions are built among different social groups. It helps to avoid essentializing gender as the only identity characteristics defining one's position in the society and within hierarchical structures.

On a structural level, intersectionality focuses on how power relations and inequality structures are constructed in a given context. Policies which adopt an intersectional approach should therefore always be connected to the larger social structures of privilege and oppression in which they are imbedded.

> In INSPIRE D3.4 Methodological framework for intersectional EDI policy case studies (Van Laer, Zanoni & Beeckmans 2023, p. 9), intersectionality is conceptualised in the following way:
>
> **Intersectionality** is a theory, methodology and analytic tool that exposes the interlocking systems of oppression and privilege, power relations and social inequalities that occur on multiple axes including but not limited to gender, ethnicity and race, social and economic status, sexuality, disability and age. It focuses on the interlocking nature of inequalities at an individual, interpersonal and structural level and how they mutually reinforce themselves (Breslin, Pandey & Riccucci 2017; Collins 1990; Athena SWAN 2021; Council of Europe 2023; Crenshaw 1989; Holvino 2010).

1.3 Feminist pedagogy and epistemology

Feminist pedagogy, methodology and epistemology and justice-cantered pedagogy, are approaches particularly relevant for educational activities, knowledge exchange and generation. Webb, Allen and Walker (2002) outline the following six principles of **feminist pedagogy**:

1) reformation of the relationship between teacher and student, whereby power becomes shared as students resume more responsibility for teaching and teachers for learning;

2) empowerment, involving principles of democracy and shared power, whereby students are taught to deal critically and creatively and to participate in transforming the world;

3) building community of growth and caring in a classroom as well as between classroom and broader environment;

4) privileging individual voice as a way of knowing by encouraging authority in others and viewing knowledge as constructed and culture-bound;

5) respecting diversity of personal experience and privileging personal lived experiences as a basis for analysis, theory generation, activism, and research;

6) challenging traditional views and practices as well as the belief that teaching and methods can be value-free.

Principles of feminist pedagogy as applied in training for gender equality are:

- participatory learning;
- validation of personal experience;
- encouragement of social justice, activism and accountability; and
- development of critical thinking and open-mindedness.

For further information see *Feminist Pedagogies in Training for Gender Equality* (Ferguson 2019).

Feminist epistemology is an approach to epistemology (rather than a single school or theory) that uses gender as a central category, while also considering other axes of discrimination and marginalisation (Vendramin 2020, p. 139). According to Marianne Janack (n.d.), it "identifies how dominant conceptions and practices of knowledge attribution, acquisition, and justification disadvantage women and other subordinated groups, and strives to reform them to serve the interests of these groups."

1.4 Diversity and inclusion

Diversity and inclusion are two interconnected but not completely interchangeable concepts. While **diversity** refers to representation within or a make-up of an entity, **inclusion** describes the process in which participation, contributions and perspectives of different groups of people are valued and integrated into the entity and its environment. They are applied as core values in the work-place and work-processes, conducting research and exchange of knowledge.

Detailed conceptual discussions on the concepts of diversity and inclusion as applied within the INSPIRE project are provided in:

- D2.1 State of the art: KSH3 Intersectional policies in Higher Education and Research: a scoping literature review (Beeckmans, Zanoni & Van Laer 2023);

- D2.6 Policy Brief 1: Inclusive Gender Equality from an Intersectional Perspective;

- D3.4 Methodological framework for intersectional EDI policy case studies (Van Laer, Zanoni & Beeckmans 2023).

Project activities at all levels of project implementation should be designed to include and consider various persons, approaches, experiences, as well as various languages, histories, geographical contexts and other structural axis of inequalities. A precondition for inclusivity is a horizontal structure in the organisation of the project and a democratic logic of participation and decision making.

For strategies to assure diversity and inclusivity through a decolonial approach to knowledge production, see following section 1.5.

1.5 Decolonial approaches to knowledge production

A demand to decolonize knowledge production is intrinsic to feminist pedagogy and epistemologies. It is based on “a belief that researchers should be critically aware of the ways in which histories of colonialism around the world have fundamentally shaped the production of knowledge about the world” (Decolonizing Knowledge Production). Colonial power relations are still manifest “in contemporary global inequalities in political, economic and socio-cultural terms, that are in turn reflected in hierarchies in contemporary knowledge production systems” (Decolonizing Knowledge Production).

According to the GenUrb portal, a decolonial approach to knowledge production involves:

- Drawing critical attention to the operation of **coloniality in knowledge production**, including forms of epistemic violence that result from racial and ethnocentric forms of thinking, and representations of colonized peoples and places around the world.
- Creating less exploitative and more respectful relations between researchers and those who are the **subjects of research**, as well as between researchers from different parts of the world.
- Critically evaluating **citation practices** to reflect on whose knowledge is referenced and circulated, the sites where the sources cited are written from, who and which regional knowledges are being erased or marginalized in citation practices, and how citation practices challenge or re-inforce hierarchies in knowledge production around the world.
- Finding new ways of creating knowledge in ways that are **inclusive of people who have historically been excluded** from knowledge-production processes, including through expanding the parameters of what counts as 'knowledge', and who can produce 'theory'.
- Connecting knowledge creation with practical projects for **redressing inequality**, overcoming disadvantage, and enabling the self-determination.
- Drawing attention to **new and emerging forms of imperialism** (for example, systems of domination tied to the expansion of global capitalism) and new possibilities for solidarities to resist the oppressive impacts that result.

(Decolonizing Knowledge Production)

In an article devised as a practical guide for decolonial knowledge production, Louis Yako (2021) outlines several principles of decolonial writing, which needs to be conducted in one's "own terms", based on one's "own timeline, lenses" and what one prioritizes as important topics. As any instance of knowledge production relies on the existing body of knowledge, Yako, following the Haitian anthropologist Michel-Rolph Trouillot (1995), emphasizes the importance of critical examination of the existing knowledge: "We must see how the facts were created; how and who assembled them; how they were collected and why certain facts were collected while others ignored or omitted; and now that they are presented to us as "legitimate" history, we must question whether they are indeed legitimate? Legitimate for whom? Who is being served and who is being disadvantaged by any given version of history (or knowledge)?" (Yako 2021)

Many researchers point to the ways dominant logic of operating of universities, research financing bodies, publishing companies, and other sites of production of academic knowledge poses serious obstacles for applying a decolonial approach. Hence the necessity to carefully examine "how knowledge is produced, by whom, whose works get canonized and taught in 'foundational theories and courses', and what kind of bibliographies and references we get to see cited in every book and published article" (ibid). In a similar vein, Romana Istratii (2020) critically observes the current knowledge production system, characterized by disconnectedness between scholarship and lived experiences, dominance of the English language in teaching and research, Western Euro-centric standards of knowledge validation, research excellence and impact (evident in citation politics, peer review norms and forms of knowledge production & sharing, a competition-based model where the value of knowledge is

measured by impact metrics, research funding principles favouring Northern academics coming from elite institutions, as well as an uneven geographic distribution of publishing houses, “with most high-impact journals being Northern, perpetuating western Euro-centric publication metrics (journal indexing and citations)” (Istratii 2020). Istratii acknowledges the positive impact of efforts done so far “to decolonize knowledge production and research methodologies” and “raise awareness around western Euro-centric funding structures and understandings of impact”, as well as of “new publishing initiatives to overcome material barriers in publishing and to make knowledge more immediately accessible through the shift to Open Access publishing & increased diversity in publishing formats (e.g., films, poetry, ethnographic notes, etc.)” (ibid). At the same time, she points to the limits of the current open access model, which “has become another business model for large publishers to continue their oligopolistic behaviour and profit-seeking practices” (ibid).

1.6 Critical approaches to the EU gender equality politics and policies

Researchers of gender-equality policies and initiatives on the European level have already established that these policies “have resulted directly from Europeanization—that is, the impact of the European Union (EU) on domestic policy” (Rawłuszko 2019). Some (Kováts 2021; Zimmermann 2007) argue that “EU-ization” would be a more precise term for this process, pointing to the fact that the very acceptance of the term “Europeanisation” point to the West-Eurocentrism of the debates about European and EU identity.

This terminological issue points to a wider symptom related to the East-West divisions in Europe and inequalities in knowledge production, on the one hand, and to the surge of anti-gender and populist sentiments and policies, particularly in the East and Central European societies, on the other. In an attempt to understand the latter process, researchers increasingly point to the connection between these two issues. They emphasize that “de-democratization of policy making” (Krizsán & Roggeband 2018, p. 94) in Central and East Europe and consequent gender equality policy “backsliding” need to be observed in the broader context of disciplining conditions of “catching up with the West” (Grabowska 2012) and “the ideology of normality,” which “was particularly useful in advancing the decade-long process of EU accession, during which many a postcommunist polity busied itself with passing laws over which it had scarcely paused to deliberate” (Krastev 2010, p. 117). They have also pointed out to several deficits and problems concerning the nature and mechanisms of the EU gender-equality policies. Marta Rawłuszko, for example, argues that “Europeanization has displayed elitist and technocratic tendencies, and it has been marked by a significant democratic deficit, meaning that gender equality policies have been implemented without engaging a wider audience or public debate (Rawłuszko 2019, p. 3).

Eszter Kováts (2021) added an important perspective to this debate, arguing how East-West inequalities “played and continue to play out within the EU in gender issues, and show how this manifests itself in gender studies and in feminist and LGBT activism in the region.” Basing her arguments on existing empirical studies and critical theoretical literature, and focussing on the four Visegrád countries, Poland, Czech Republic, Slovakia and Hungary, Kováts

demonstrates “that anti-gender discourse is a right-wing language of resistance against existing material and symbolic East- West inequalities in Europe” (Kováts 2021; see also Korolczuk & Graff 2018).

This growing body of research and critical voices it produces point to the fact that gender policies and mainstreaming and opposition to them cannot be reduced to binary positions of progressiveness / openness / liberalism / Europeanness vs. conservatism / nationalism / authoritarianism / anti-Europeanness but must be seen as part of broader sociopolitical processes at both national and transnational levels. It furthermore calls for a self-reflective approach in shaping and implementing gender-equality policies across Europe.

In INSPIRE D2.6 INSPIRE Policy Brief 1: Inclusive Gender Equality from an Intersectional Perspective (Palmén et al. 2023), geographical inclusiveness has been operationalised in the following way:

The INSPIRE projects insists on geographic inclusiveness as a way to establish the necessary conditions to critically re-examine existing policies largely based on Western and Northern European experiences and their presumed universal value. Developing an approach based on geographical inclusiveness will also enable questioning the idea of simple, one-directional transferability of gender equality policies from one context to another within ERA.

In the development of such approach, we build upon the specific experience of ACT project of facilitating and supporting the GEinCEE and Alt+G communities of practice.

1.7 Open science[2]

UNESCO Recommendation on Open Science defines open science as an “inclusive construct that combines various movements and practices aiming to make multilingual scientific knowledge openly available, accessible and reusable for everyone, to increase scientific collaboration and sharing of information for the benefits of science and society, and to open the processes of scientific knowledge creation, evaluation and communication to societal actors beyond the traditional scientific community. It comprises all scientific disciplines and aspects of scholarly practices, including basic and applied sciences, natural and social sciences and the humanities, and it builds on the following key pillars: open scientific knowledge, open science infrastructures, science communication, open engagement of societal actors and open dialogue with other knowledge systems” (UNESCO 2021, p. 21).

Although open science and the promotion of gender equality in R&I not only share the same aims, objectives, methods, and structures, but also face the same obstacles arising from the unequal global, national, and institutional distribution of power along geopolitical and intersectional lines, synchronous conceptualisations and implementations are largely lacking (Martínez Samper 2023).

[2] Authors acknowledge significant contribution of Katja Kobolt (ZRC SAZU) in developing this section.

Principles of open science are at the core of the INSPIRE project. As defined in the Grant Agreement, Open science is “an approach to the scientific process based on open cooperative work, tools and diffusing knowledge” (Annex 5, p. 4).

In contrast to reductive approaches that often limit the implementation of Open Science only to open access to research data and results – usually controlled by a paywall and thus deepening not only geopolitical, institutional, but also gendered and other intersectional inequalities in R&I – INSPIRE extends its Open Science approach to all of the conceptual approaches identified by Fecher and Frieske (2013). Bearing this in mind, INSPIRE integrates a gender- and intersectionally-sensitive approach into all these identified Open Science approaches:

- at the **infrastructure level** (i.e. technological aspects enabling inclusive communication and collection of data; relevant aspects of event management that enable work-life balance);

- at the **level of transparency and public accessibility of knowledge production** (i.e., gender-sensitive definition of research questions and methods);

- at the **level of measurement** (i.e. evaluation of excellence);

- at the **level of democratic access to research data and results**, including all ethical and data management aspects (i.e. avoidance of payment barriers to dissemination, accessible communication, gender-sensitive and interjection-sensitive ethical aspects - i.e., GDPR);

- at the **organizational level** (aspects of collaborative research, e.g., organisation of tasks).

1.8 Ethics and research integrity

Research ethics promote free, reliable, and responsible research. Research ethics consist of two general aspects: (a) core set of scientific norms, and (b) common norms of responsible research.

A core set of scientific norms were “developed over time and institutionalised in the international research community” (NESH 2022). They constitute good scientific practice and foster integrity in research. In general, these norms could be clustered into:

- the truth norm – as searching for truth, commitment to truth, integrity, and honesty as preconditions for quality and reliability in research;

- methodological norms – as application of principles of factuality, accuracy, transparency, and accountability;

- institutional norms – as dedication to research as open, collective, independent, and critical endeavour (NESH 2022).

Common norms of responsible research stem from the respect for human dignity and derive from demands and expectations that society put before research and the social role it should play. Human dignity as a core value is protected by three principles:

- respect for equality, freedom and autonomy,

- beneficence and protection from the risk of significant harm and unreasonable burdens, and

- justice in procedures and the distribution of benefits and burdens (*Belmont Report* in NESH 2022).

For further details see:

Guidelines for Research Ethics in the Social Sciences and the Humanities (National Committee for Research Ethics in the Social Sciences and the Humanities – NESH, Norway).

Research ethics (Social Research Association, UK).

As simply put by the UKRIO, **research integrity** is another name for 'good research practice'. It is the conduct of research in such a way which allows others to have trust and confidence in all aspects of the research process (UKRIO.ORG).

The Singapore Statement agreed at the 2010 World Conference on Research Integrity (WCRIF) sets out four principles:

- Honesty in all aspects of research
- Accountability in the conduct of research
- Professional courtesy and fairness in working with others
- Good stewardship of research on behalf of others

(Singapore Statement on Research Integrity)

As stipulated in the Grant Agreement, consortium partners "must carry out the action in compliance with: ethical principles (including the highest standards of research integrity), and applicable EU, international and national law, including the EU Charter of Fundamental Rights and the European Convention for the Protection of Human Rights and Fundamental Freedoms and its Supplementary Protocols.

… [they] must pay particular attention to the principle of **proportionality**, the **right to privacy**, the **right to the protection of personal data**, the **right to the physical and mental integrity**

of persons, the **right to non-discrimination**, the need to ensure **protection of the environmen**t and high levels of **human health protection**" (Annex 5, p. 2).

Fundamental principles of **research integrity**, as set out in the European Code of Conduct for Research Integrity, are listed in Grant Agreement, Annex 5, p. 2–3.

For further details see: ALLEA. *The European Code of Conduct for Research Integrity – Revised Edition 2023.* Berlin: ALLEA – All European Academies, 2023. https://doi.org/10.26356/ECoC.

2 Guidelines for Various Types of Project Activities

In this section, guidelines are organised into clusters addressing groups of similar activities within different tasks to be conducted within the INSPIRE project. These are:

- 2.1 Tasks involving data collection and accumulation of existing knowledge;

- 2.2 Tasks involving research and creation of new knowledge;

- 2.3 Tasks involving creation of applicable tools and products;

- 2.4 Tasks involving interaction with external experts and beneficiaries;

- 2.5 Tasks involving knowledge exchange and dissemination;

- 2.6 Tasks involving event organisation;

- 2.7 Tasks involving writing reports, deliverables, analyses, and other textual outputs.

Where applicable, the Guidelines direct to useful resources and existing good practices.

2.1 Tasks involving data collection and accumulation of existing knowledge

Several tasks within the INSPIRE project concern collection of information (directly by consortium members, via external experts and via machine learning) and overviewing the existing knowledge. Consortium members scope literature to **map the existing knowledge** (T2.1), **conduct surveys** among stakeholders (gathering country context information via national experts in T2.1, via GEP monitoring survey in T3.2, and via GEAMv3 survey in T3.5), create databases for **mapping experts and stakeholders** (T2.2), to name a few of such tasks.

The issues relating to the interaction with the experts in the process of accumulating existing knowledge are covered in the sections 2.4 Tasks involving interaction with external experts and beneficiaries, and 2.5 Tasks involving knowledge dissemination and exchange.

2.1.1 Guidelines:

→ Develop strategies to gather data and existing knowledge in a manner that reflects researchers' own positionality and awareness of potential own bias.

GE Academy D3.3 Quality Standard Booklet (Cacace, d'Andrea & Marta 2021, p. 11) provides a useful suggestion on gender training principles, which could be applied to the process of accumulation of new and existing knowledge:

"**Self-reflection and Reflexivity**: Both trainers and participants constantly reflect on the training experience and learning process, acknowledging embedded power relations and reviewing their own practices and assumptions (self-reflection), while the very attitude to self-reflection is promoted and fostered (reflexivity)."

→ Include knowledge production in local languages when reviewing literature and existing knowledge.

Guide to Good Practice for Inclusive Research in Global Development (Altink et al. 2022, p. 6) provides good advice on developing research methodology:

"Appreciate the range of indigenous, local knowledges through e.g. ensuring local leadership within the research process and/or the use of participatory research methods. …

Be aware of biases in secondary data, e.g. only views of male leaders represented, or data generated by smaller NGOs less likely to be accessible on online databases."

→ Pay attention to gathering information from areas peripheral to the centres of knowledge production.

Guide to Good Practice for Inclusive Research in Global Development (Altink et al. 2022, p. 6) provides good advice on developing research methodology:

"Make sure data collection includes different groups and does not just rely on elites, unless that is the focus of the project. Remember that the [your research field] is not homogeneous and be mindful of power hierarchies within different countries …"

→ When collecting data, it is important that research materials (e.g. **surveys**) are understandable and accessible to as many people as possible. This includes the format of the materials as well as the language used. Regarding the format, "the length of materials (for example the length and number of questions in a survey) should be no longer than absolutely necessary — keeping materials short and to the point will reduce demand on participants and make your study more accessible to some groups" (GOV.UK 2022). Consider using inclusive interfaces in terms of usability, particularly for disabled persons.

A Guide to Inclusive Social Research Practices (GOV.UK 2022) outlines the key questions to consider at the data collection stage include:

- are the research materials accessible?
- what demographic information is needed?
- how will recruitment of participants be inclusive?
- how can questions be worded, presented, and probed sensitively? Could harmonised standards help?
- is online recruitment and/or data collection appropriate?

→ Reflect on potential biases in the development of the data collection tools (e.g. databases), categories and vocabulary they use and ways of clustering data. Pay attention that the database presents as even geographical distributions of knowledge and expertise as possible, and be aware to not reproduce gender bias.

In the book *Data Feminism* authors present approach to data science and data ethics that is informed by the ideas of intersectional feminism (D'Ignazio & Klein 2023). By critically analysing existing practices in collection, analysis and presentation of data, the book provides suggestions on how to design data collection tools in ways which are gender-sensitive, inclusive, ethical and transparent.

2.2 Tasks involving research and creation of new knowledge

Several tasks within the INSPIRE project involve field and desk research, conducting systemic analyses of the gathered data in order to create new knowledge. For instance, consortium members conduct **case studies** of GEP success & failure (T3.3), equality-diversity-inclusion (EDI) policies (T3.4), and of gender sensitive innovation policies (T3.6); explore **analytical synergies** of gathered data/insights (T3.7); draw practice-driven **research insights** on KSH work and CoP progress (T4.2).

2.2.1 Guidelines:

→ Consider **gender dimension** in all stages of research, from formulation of research questions, through methodology design to conducting analysis, writing synthesis and presentation of results.

For practical guidance on how to integrate a gender-sensitive approach into steps of project activities see:

Gendered Innovations 2: How Inclusive Analysis Contributes to Research and Innovation (Schiebinger et al. 2020)

Toolkit for Gender in EU-funded Research (Yellow Window 2011)

Toolkit for Integrating Gender- Sensitive Approach into Research and Teaching (Mihajlović Trbovc & Hofman 2015).

→ While adhering to gender mainstreaming in research take into account an **intersectional approach** in the whole process of knowledge production.

Gendered Innovations 2: How Inclusive Analysis Contributes to Research and Innovation (Schiebinger et al. 2020) suggests list of factors to consider in an intersectional analysis:

gender	sexual orientation	genetics
disabilities	LGBTI+ identity	sex hormones
ethnicity	religion	reproductive status
race	educational background	body composition
age	lifestyle	comorbidities
geographic location	language	body size
socioeconomic status	family configuration	
nationality	environment	

This list should not be considered neither exhaustive nor finite, while each factor should be conceptualised according to the given context and meanings associated with each of the categories in the given setting.

→ Applying intersectional approach is highly **context** dependant, therefore pay attention to understand all aspects of socio-cultural, political and economic context in a given setting in order to evaluate how different aspects of individual's identity and positionality produce both discriminations and privileges.

→ Build on previous knowledge, but be **critical** about its epistemological approach, underlying assumptions, and potential biases.

→ Make sure the **case study selection** is representative and diverse considering the different axis of inequalities, and that the sampling enables both furthering theoretical development and challenging old underlying assumptions of the existing knowledge.

→ Develop strategies for **decolonial** approaches to knowledge production on GE in Europe. Challenge the idea of linear and one-way transfer of knowledge; consider arguments and insights from different geographical settings, different traditions and legacies; include knowledge production in local languages and non-Western settings.

→ Be **inclusive** when conducting research. Consider what intersectionality means in different cultural and national contexts, such as post-colonial or post-socialist countries.

A Guide to Inclusive Social Research Practices (GOV.UK 2022) offers advice on research design that intends to include **seldom heard groups** into a research:

"From the outset of a project, researchers should endeavour to design inclusive research. This means taking time to understand different groups or sub-groups within the research and acknowledging the barriers and enablers of different designs. For example, using a mixed methods or purely qualitative approach can prove advantageous when looking at seldom heard groups, as they provide the researcher with a deeper level of insight and understanding.

Questions to consider at the research design stage include:

- have I scoped the project thoroughly and ensured that I am aware of all seldom heard groups I need to engage with during the project?

- have I considered who to sample?

- how will I sample? How will this approach reach the seldom heard groups I want to engage with?"

If applicable, consult A Practical Guide to Inclusive Research focused on research with people with **disabilities**, and LGBT Foundations' Guidance for research with LGBT+ communities.

→ Relevant deliverables outlining research methodology need to have provisions for obtaining **informed consent** from participants.

Guide to Good Practice for Inclusive Research in Global Development (Altink et al. 2022, p. 6) provides good advice on this issue – though designed for research in global South, they are applicable to any culturally sensitive research:

"Obtaining **participants' consent** for involvement in research activities (e.g. questionnaires, interviews) might involve different practical considerations in some cultures, and standard ways of collecting signatures on consent forms may not be appropriate. You should agree with South-based partners the best means to obtain consent, to arrive at a solution that meets critical standards while being sensitive to cultural context.

Informing participants about the research topic or processes may require a simplified structure in specific contexts, matching with the appropriate cultural practices."

→ When conducting field research involving research participants and/or stakeholders be aware of their different understandings of the problem at stake, and different ways of knowing.

GE Academy D3.3 Quality Standard Booklet (Cacace, d'Andrea & Marta 2021, p. 11) provides a useful suggestion on gender training principles, which could be applied to the process of creating new knowledge through interacting with stakeholders:

"Recognition of **multiple "Knowledges"** and **ways of knowing**, and relevance of **"ownership" of knowledge**: Knowledge creation is regarded as a collective and inclusive process, and the diverse knowledges of participants are recognised, as well as how these are positioned differently. The training process accommodates the sharing of the diverse knowledge owned by participants and trainers, as well as different ways of knowing."

→ Be reflective of own position vis-à-vis that of stakeholders you are interacting with.

A Guide to Inclusive Social Research Practices (GOV.UK 2022) provides a good guidance on conducting **qualitative analysis**:

"Particular care should be taken to ensure **reflexivity** in qualitative analysis when conducting research into the experiences of seldom-heard groups. Well-facilitated qualitative methods should allow for the representation of issues and experiences that are important to the participant (rather than just the researcher) in the data generated. This is applicable when working with research participants as well as when undertaking documentary or observational analysis. It is also necessary to acknowledge the positionality of the researcher when analysing this data and how this might influence the conclusions reached. Grounded theory-based approaches can help to focus on the substance of the data itself and generate theories that reflect what matters to seldom heard groups."

→ Adopt a **longue durée** perspective in explaining and analysing phenomena – consider developments and genealogies that precede the present state of affairs, as well as locally situated knowledge and context.

→ When **reporting** on conducted research, describe not only what has been done, but also which part of the initial research plan was not executed or how it deviated from the plan, and explain why. Negative results are as valid as positive findings for reporting.

2.3 Tasks involving creation of applicable tools and products

Several tasks within the INSPIRE project concern the creation of tools and products to be used by R&I organisations or GE practitioners. The creation of a tool/product usually involves its development, piloting and final refinement of the tool / product. The piloting of a tool / product as a rule involves testing on a target population or within an R&I organisation, typically INSPIRE's COPs' members, who voluntarily participate in the process of applying and evaluating the quality of the tool/product.

Consortium members develop **GEAMv3** for R&I organisations to use (T3.4); create, pilot and deliver **support packages for CoPs** (T4.4); setup **online infrastructures** for online collaboration space for KSH and CoPs (T5.1), CoE portal and service site (T5.2), data repository and interoperable resource infrastructure (T5.3); develop **open training units**, including toolkits, offered through online training platform (T6.1, T5.4, T6.3).

The issues relating to the interaction with the target organisations and other stakeholders in the piloting process are covered in the sections 2.4 Tasks involving interaction with external experts and beneficiaries, and 2.5 Tasks involving knowledge dissemination and exchange, below.

2.3.1 Guidelines:

→ Be gender-sensitive when designing and planning the implementation of the tool/product as well as its evaluation. Try to apply intersectional approach to the whole process of design – implementation – evaluation of the tool / product.

→ Think of users as a heterogeneous and diverse group of people considering the different axis of inequalities – the tool should be usable and useful for all of them.

→ Think whether the tool/product is accessible to people with disabilities.

→ Develop provisions to overcome language barriers and make the tool/product accessible to users who are not proficient in English.

→ Think how the choice of the language of the tool/product influences on its geographical reach.

→ Be inclusive and gender-sensitive in selection of visual material and use non-sexist and inclusive language when writing the text of the tool / product.

→ When selecting examples and good practices, be sensitive to social and geographical specificities; include alternative/underrepresented voices, geographic areas, practices and traditions.

> A page on "Designing for Identity" within the online platform Practical Guide to Inclusive Research provides an overview for using different pronouns in online applications (see Siegel 2021).

→ When writing the text within a tool / product (e.g., a manual, questions within a questionnaire) that is supposed to be used by a variety of stakeholders, avoid professional lingo that can skew the main points.

In developing and delivering **open training units**, consortium partners should build on existing good practices, such as those developed in GE Academy D3.3 Quality Standard Booklet (Cacace, d'Andrea & Marta 2021). In it, the gender training standards are organised into following phases:

1. Training design
2. Planning and preparation
3. Implementation
4. Evaluation

For each standard, specific principles from a thorough list are applied forming the **PERFCKTSI model** proposed by the Yellow Window organisation in the framework of the institutional change project SUPERA (see Cacace, d'Andrea & Marta 2021).

2.4 Tasks involving interaction with external experts and organisations

Several tasks within the INSPIRE project involve various types of interaction with **individuals**, such as external experts (national experts in T2.1; experts / users in T3.1; KSH experts in T4.1), representatives of funders and/or policy makers / stakeholders (T2.4, T7.5) and other stakeholders (e.g., change catalysts in T6.2). Furthermore, different **R&I organisations and their representatives** are engaged as beneficiaries in CoPs supported through KSHs by the INSPIRE project (T4.1, T4.2, T4.4). Members of CoPs also provide valuable insight for consortium members regarding their activities (T4.3). Representatives of various R&I organisations are involved in tasks based on mutual exchange (e.g., knowledge-exchange events in T4.2; establishing strategic alliances T7.2). Finally, project external service providers are commissioned when needed.

In these interactions, the principles of proportionality, fairness, mutual benefit, multidirectionality, inclusivity and diversity should be applied. Potential conflict of interests should be anticipated where applicable and provisions for addressing it set in place.

2.4.1 Guidelines:

→ When inviting external experts to participate in project activities, in the selection process pay attention to the principles of **gender balance** and **intersectionality**. However, in the process of ensuring diversity, be aware of the bias ingrained in using identity labels – rely on selecting individuals on the basis of their public self-identification and lived experience.

→ Selection of trainers / experts / change catalysts should be informed, need-based and inclusive.

GE Academy D3.3 Quality Standard Booklet (Cacace, d'Andrea & Marta 2021, p. 35) provides a good example on defining gender+ trainer profile, which encompasses:

- basic expertise,

- methodological skills,

- personal and social competence.

→ When engaging with representatives of R&I organisations, ensure that the sample is as **diverse** as possible.

→ Think who are seldom-heard groups relevant for the process in place, and make sure to find a way to include them.

→ When **commissioning work** from external experts (e.g., national experts or KSH external experts), ensure that the payment is fair for the work required, equal for the equal amount of work, and timely issued. Calibrate requests for an external expert's contribution so it is reciprocal to the economic compensation they are receiving.

→ When commissioning work from **external service** providers, ensure that the commissioning procedure is transparent and open to multiple bidders. The commissioning procedure should serve both quality of the service and rational and responsible use of the project funds.

→ When garnering knowledge and expertise from the experts that are **not employed** by the project, pay attention that this is a reciprocal and fair exchange. It is fair to ask people for information, but not to ask them to do analysis, summary or looking for information that could be publicly accessed. The people contributing information for the project should be also gaining something from this collaboration, such as being involved into networking or getting information that is valuable for them.

→ Engagement of CoP members / facilitators / representatives must be voluntary and non-discriminatory.

CoP facilitators can be advised to use ACT Community of Practice Co-creation Toolkit v.2 (Thomson & Rabsch 2021).

For those data-collection and knowledge-generation tasks which involve **interaction with external stakeholders** (see sections 2.1 and 2.2), consider the following:

→ Invite diverse individuals, considering the different axis of inequalities, in order to gather diverse perspectives.

The *Guide to good practice for inclusive research in global development* (Altink et al. 2022) provides good advice on this issue – though designed for research in global South, they are applicable to any inclusive and culturally sensitive research:

"Make sure data collection includes different groups and does not just rely on elites, unless that is the focus of the project. Remember that the global South is not homogeneous and be mindful of power hierarchies within different countries in the global South." (p. 6)

→ Get information on experts/stakeholders that are known locally rather than internationally, in order to reach knowledge that is genuinely locally relevant.

→ Involve local experts into the process of **knowledge production**, and avoid treating them only as information providers.

2.5 Tasks involving knowledge exchange and dissemination

Several tasks within the INSPIRE project entail organisation of workshops, focus groups and other events aimed at enabling exchange of knowledge and perspectives. In the INSPIRE project, **focus groups** in most cases have the aim to gather diverse perspectives from the experts and stakeholders in the process of designing applicable tools and products (e.g., focus groups for discussing early drafts of GEP monitoring indicators and a transfer strategy in T3.1; for developing GEAMv3 in T3.5). **Workshops** planned as part of the INSPIRE project range from those aimed at enabling mutual exchange of ideas (e.g., workshop with research funders and key policy stakeholders on reimagining vision of inclusive gender equal future in T2.4) to those aimed at disseminating knowledge created as part of the project. Workshops aiming for various outcomes are organised in T3.2 and T7.5, including co-creation workshops in T3.4, T4.3, T7.3.

In all cases it is important to create a safe and inviting place for discussion, and organise this exchange in inclusive and gender-sensitive ways.

2.5.1 Guidelines:

→ For organising focus groups and workshops consult existing standards and good practices.

> In ACT Community of Practice Co-creation Toolkit v.2 (Thomson & Rabsch 2021) you may find:
>
> - Tips & quick guide to participatory methods (p. 25–27), particularly useful for **co-creation workshops**;
>
> - Tips & tricks for web-based applications and online methods (p. 28–33), particularly useful for **online** workshops and focus groups.

→ Develop mechanisms for respectful and inclusive participation in discussions. Make sure to open space for everyone to express their point of view on the topics which concern them and about which they possess knowledge.

→ Adhere to the rule of **focus group** organisation that each participant is given opportunity (by the rule of the round) to express their perspective on each of the posed questions. Should you notice that a participant is silenced or interrupted you should intervene in a way that gives them voice.

Find basic information on focus group method in ACT Community of Practice Co-creation Toolkit v.2 (Thomson & Rabsch 2021, 70) .

→ Use non-sexist and inclusive language and make sure you are using adequate nouns and personal **pronouns** when addressing discussants. While use of pronouns is an evolving field and the linguistic norms are not set in stone (in English), it is always respectful to use pronouns persons use for themselves.

For short advice on use of pronouns, consult EIGE web page Gender-sensitive Communication: Pronouns.

Consult a thorough online resource explaining contextual use of different pronouns and providing help with typical mistakes: https://pronouns.org/.

For further information on gender sensitive and inclusive language use, see *Toolkit on Gender-sensitive Communication: A resource for policymakers, legislators, media and anyone else with an interest in making their communication more inclusive* (EIGE, 2019).

Further guidelines and additional references for gender sensitive and inclusive language use are provided in the Section 2.7.1.

→ Actively encourage participants' engagement, self-reflection and reflexivity.

→ Use non-hierarchical modes of teaching, learning, and exchange.

→ When providing didactic or illustrative examples include experiences and narratives of diverse people.

→ Apply principles of **feminist pedagogy**:

- participatory learning;
- validation of personal experience;
- encouragement of social justice, activism and accountability; and
- development of critical thinking and open-mindedness.

For further information on feminist pedagogy see *Feminist Pedagogies in Training for Gender Equality* (Ferguson 2019).

→ Adopt an intersectional and gender-sensitive lens in the selection of examples that are discussed within the focus group, or used as an educational tool in a workshop.

→ Design activities building upon multiple knowledges, skills and ways of knowing.

→ Include narratives, experiences and histories of diverse people, including women and non-binary persons, ethnic and racial minorities, elderly people, young people, persons with disabilities, etc.

→ Make sure that the materials used are accessible to all participants.

→ Make sure that the textual and visual materials used in presenting cases / arguments / examples are gender-sensitive and adopt an inclusive, intersectional perspective.

→ Make sure to request and receive feedback from participants is after the event. Consider these feedbacks when writing summaries / reports of the event.

2.6 Tasks involving event organisation

Several tasks within the INSPIRE project involve organisations of public events, such as knowledge-exchange events (T4.2) and conferences (T7.4). The work-life balance provisions set-out here should apply also to focus groups and workshops when organised as physical events.

2.6.1 Guidelines:

→ Include marginalised groups when selecting panel speakers for conferences, workshops and other events. Adopt an intersectional lens in the selection process.

→ Strive toward gender balance in the panels and in selection of event participants. However, as we are referring to gender issues, and bearing in mind that the interest in this topic is significantly imbalanced, it is often difficult to find cis-men with expert knowledge in the topic.

→ Strive toward clear and transparent selection procedures.

→ In the selection of speakers and participants, be careful not to reproduce existing hierarchies and power relations.

→ In selection of speakers and participants, make sure to include persons of different backgrounds, and base your selection criteria on the specific kinds of knowledge and experience they have and not on the prestige or institutional/geographical centrality. Consider also other axis of inequality, which are relevant for the specific topic and context of the event.

Work-life balance provisions:

→ In organisation of events, respect the need of participants to balance between work and private life; if possible, make sure to assist with childcare and be sensitive to individuals' particular working/family/personal situations.

→ If possible, create working conditions that will enable individuals to reconcile their private life with their professional activities.

→ Acknowledge unpaid and reproductive work of the attendees, their family members and child carers. For example, check with attendants of an event whether they need support in accommodating their children in case these are accompanying them. Where possible provide or enable child care options. If family members accompany an event attendee enable their presence on premises and inclusion in the food provision.

→ Make sure to receive feedback from participants is received after events.

2.7 Tasks involving writing reports, deliverables, and other textual outputs

Virtually all tasks within the INSPIRE project involve writing reports and/or deliverables. Many tasks involve writing analyses, policy recommendations, blogs (T2.4) and other textual outputs.

Publication strategy and principles of ethical use of the research results are given in Section 3 of this deliverable.

2.7.1 Guidelines:

Here is some general advice:

A Guide to Inclusive Social Research Practices (GOV.UK 2022) advises:

There is no 'one-size-fits-all' template for writing up your analysis, but you should aim to include:

an overview of the problem – why was this research or analysis conducted?

how did you collect and analysed your data – including recruitment details, details of participant demographics, and analytical methods used – particularly details of any quantitative or qualitative methods.

the results of your analysis, in which all sub-group analyses conducted should be reported. Take care not to unintentionally marginalise and/or stigmatise groups in the language that is used to report the results.

if you have used a qualitative approach, you may need to consider a longer results section, for example if you are including anonymised quotes.

conclusions of your analysis or research, and recommendations for how it should be considered and applied in the real world, particularly for seldom-heard groups.

→ Nurture the culture of **inclusive language** use, which enables and reflects social diversity and prevents perpetuating stereotypes and biases. It "avoids making false assumptions about (or stereotyping) people based on their age, cultural background, disability, gender, Indigenous background or sexual orientation and gender identity" (Word at Work, 3).

Diversity Council of Australia advises:

- **Context matters**
  Language that may be fine outside of work can be noninclusive at work. Sometimes people can use terms about themselves or their friends that are not appropriate for others to use about someone in a work context.

- **Keep an open mind**
  Be open to changing what you have always thought is 'normal', respectful and appropriate to say. You don't have to be perfect – just be willing to learn.

- **If in doubt, ask**
  If you're not sure what terminology someone prefers, just ask them! Ask the person or contact organisations which make up and represent given diversity groups.

- **Focus on the person**
  Focus on the person first, rather than the demographic group they belong to. Only refer to an individual's age, cultural background, gender etc. if it is relevant.

- **Keep calm and respond**
  Sometimes our unconscious biases mean we can say things that exclude others – even when we do not intend to.

Using gender-inclusive language means speaking and writing in a way that does not discriminate against a particular sex, gender or gender identity, and does not perpetuate gender stereotypes. Gender-inclusive language avoids bias towards a particular sex or gender or the use of expressions that exclude particular groups of people. Men, women and gender-diverse people should be included and referred to explicitly in language.

Practical advice on the use of inclusive, gender-sensitive, and non-sexist language:

- Use gender-neutral nouns as generic forms. Avoid using male pronouns and nouns for unspecified individuals.
- Use gender-sensitive nouns and pronouns when referring to concrete (known) individuals.
- Use language that is inclusive of different genders, beyond gender binarism.
- Make sure that people of all genders and social statuses are being addressed/referred in the same manner.
- Avoid ageism, ableism, classism, racism in language, as well as language that reproduces gender bias and/or ethno-national stereotypes.
- Exclude pejoratives and words that diminish anyone, e.g., women and minorities.
- In selection of visual and textual material, adopt an intersectional and gender lens.

Some useful sources for inclusive language use (for English):

- EIGE web page Gender-sensitive communication: Solutions for how to use gender-sensitive language

- *Toolkit on Gender-sensitive Communication: A resource for policymakers, legislators, media and anyone else with an interest in making their communication more inclusive* (EIGE, 2019).

- UN Guidelines for gender-inclusive language in English provide useful advice when gender is relevant for communication and should be made visible, and when it is not relevant and should not be visible.

- Guide for inclusive language use prepared by the Diversity Council of Australia.

- Guidelines for gender- sensitive communication in research and academia by the SUPERA project.

APA Style provides useful general principles for reducing bias in writing.

- Find Checklist for Gender Revisions at the bottom of the guidelines on Gender-Sensitive Language of the Michigan Technological University.

→ Make sure that texts produced do not contain pejorative or diminishing and insulting expressions.

→ Make sure that texts / images do not reflect gender, ethnic, racial or other stereotypes.

→ Make sure that images and other visual materials are inclusive and not offensive to any group or individual. They should not display women in passive attitudes but rather in active and leadership roles and/or stereotype-breaking attitudes/positions.

→ Make sure the authorship is rightfully and adequately ascribed to all participating individuals.

→ Make sure that the sources, ownership and authorship of all parts of the texts and materials used are adequately and clearly indicated.

→ Check whether in referencing authors both name and surname are used, unless authors themselves choose not to use part of their name. Using solely a surname is acceptable and meaningful only in case of often repetition within the text. This is important for visibility of women and exact recognition of authorship. Original diacritics and language-specific characters should be used in writing names and surnames – this is important for embracing language diversity.

→ Check if references to non-English publications contain title in the original language and a translation to English. This practice values the knowledge production in local languages, while enabling international communicability.

3 Publication Strategy and Principles of Ethical Use of the Research Results[3]

These guidelines cover both the research results planned to be published as part of the INSPIRE project, and the publications that might use the outcomes of the research and activities conducted as part of the INSPIRE project, but were not initially planned in DoA. **Results** here means “any tangible or intangible effect of the action, such as data, know-how or information, whatever its form or nature, whether or not it can be protected, as well as any rights attached to it, including intellectual property rights” (Grant Agreement, Art. 16.2, p. 34).

These guidelines complement the Grant Agreement as well as the Consortium Agreement.

The following rules apply (cumulatively):

→ All publications that use research results and outcomes of the INSPIRE project must **acknowledge the project funding** as stipulated in the Grant Agreement (Art. 17.2: Visibility – European flag and funding statement, p. 35–36). Therefore, all publications should state following: This project has received funding from the European Union’s Horizon Europe research and innovation programme under grant agreement No 101058537. The visual arrangement of this text and the European flag (emblem) is given at the very end of the INSPIRE deliverable template, and as such is recommended for use in the stand-alone publications resulting from this project.

[3] Authors acknowledge significant contribution of Jörg Müller (FUOC) in developing this section.

17.2 Visibility — European flag and funding statement

Unless otherwise agreed with the granting authority, communication activities of the beneficiaries related to the action (including media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc., in electronic form, via traditional or social media, etc.), dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant must acknowledge EU support and display the European flag (emblem) and funding statement (translated into local languages, where appropriate):

The emblem must remain distinct and separate and cannot be modified by adding other visual marks, brands or text.

Apart from the emblem, no other visual identity or logo may be used to highlight the EU support.

When displayed in association with other logos (e.g. of beneficiaries or sponsors), the emblem must be displayed at least as prominently and visibly as the other logos.

For the purposes of their obligations under this Article, the beneficiaries may use the emblem without first obtaining approval from the granting authority. This does not, however, give them the right to exclusive use. Moreover, they may not appropriate the emblem or any similar trademark or logo, either by registration or by any other means.

(Grant Agreement, Art. 17.2, p. 35–36)

→ The consortium partners “must ensure **open access** to peer-reviewed scientific publications relating to their results”, as defined by the Grant Agreement (Annex 5, Art. 17, Section: Open science: open access to scientific publications, p. 11). In short, open access means “online access to research outputs provided free of charge to the end-user” (Annex 5, p. 4).

Open science: open access to scientific publications

The beneficiaries must ensure open access to peer-reviewed scientific publications relating to their results. In particular, they must ensure that:

- at the latest at the time of publication, a machine-readable electronic copy of the published version or the final peer-reviewed manuscript accepted for publication, is deposited in a trusted repository for scientific publications

- immediate open access is provided to the deposited publication via the repository, under the latest available version of the Creative Commons Attribution International Public Licence (CC BY) or a licence with equivalent rights; for monographs and other long-text formats, the licence may exclude commercial uses and derivative works (e.g., CC BY-NC, CC BY-ND) and

- information is given via the repository about any research output or any other tools and instruments needed to validate the conclusions of the scientific publication.

Beneficiaries (or authors) must retain sufficient intellectual property rights to comply with the open access requirements.

Metadata of deposited publications must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent, in line with the FAIR principles (in particular machineactionable) and provide information at least about the following: publication (author(s), title, date of publication, publication venue); Horizon Europe or Euratom funding; grant project name, acronym and number; licensing terms; persistent identifiers for the publication, the authors involved in the action and, if possible, for their organisations and the grant. Where applicable, the metadata must include persistent identifiers for any research output or any other tools and instruments needed to validate the conclusions of the publication.

Only publication fees in full open access venues for peer-reviewed scientific publications are eligible for reimbursement.

(Grant Agreement, Annex 5, Art. 17, Section: Open Science, p. 11)

→ In accordance with the Grant Agreement (Annex 5, p. 4, see below) and the Consortium Agreement, (Section 8, p. 16–17), results are owned by the consortium partner who generates them.

→ **Joint ownership** of the results is governed by Grant Agreement Article 16.4 and its Annex 5, Section Ownership of results (p. 4–5). Consortium Agreement further stipulates use and exploitation of the jointly owned results in Section 8.2 (Joint ownership, p. 17). These stipulations need to be consulted when deciding on dissemination and exploitation of the results created by more than one person.

Ownership of results

Results are owned by the beneficiaries that generate them.

However, two or more beneficiaries own results jointly if:

- they have jointly generated them and

- it is not possible to:

- establish the respective contribution of each beneficiary, or

- separate them for the purpose of applying for, obtaining or maintaining their protection.

The joint owners must agree — in writing — on the allocation and terms of exercise of their joint ownership ('**joint ownership agreement**'), to ensure compliance with their obligations under this Agreement.

Unless otherwise agreed in the joint ownership agreement or consortium agreement, each joint owner may grant non-exclusive licences to third parties to exploit the jointly-owned results (without any right to sub-license), if the other joint owners are given:

- at least 45 days advance notice and

- fair and reasonable compensation.

The joint owners may agree — in writing — to apply another regime than joint ownership.

If third parties (including employees and other personnel) may claim rights to the results, the beneficiary concerned must ensure that those rights can be exercised in a manner compatible with its obligations under the Agreement.

The beneficiaries must indicate the owner(s) of the results (results ownership list) in the final periodic report.

(Grant Agreement, Annex 5, Section: Ownership of results, p. 4–5)

> 8.2 Joint ownership
>
> … Unless otherwise agreed:
>
> − each of the joint owners shall be entitled to use their jointly owned Results for non-commercial research and teaching activities on a royalty-free basis, and without requiring the prior consent of the other joint owner(s).
>
> − each of the joint owners shall be entitled to otherwise Exploit the jointly owned Results and to grant non-exclusive licenses to third parties (without any right to sub-license), if the other joint owners are given: (a) at least 45 calendar days advance notice; and (b) fair and reasonable compensation.
>
> The joint owners shall agree on all protection measures and the division of related cost in advance.
>
> (Consortium Agreement, Section 8.2 Joint ownership, p. 17)

→ **Dissemination** of the results is regulated by the Grant Agreement (Annex 5, Art. 17, p. 10–11) and further defined by Consortium Agreement (Section 8.4 Dissemination). Dissemination is “the public disclosure of the results by appropriate means, other than resulting from protecting or exploiting the results, including by scientific publications in any medium” (Grant Agreement, p. 3). The Consortium Agreement (Art. 8.4.2) defines prior notice of any planned publication (21 days) and procedure in case of an objection, which may be issued within 14 further days.[4] These stipulations need to be consulted when preparing for dissemination of results.

[4] It should be noted that Grant Agreement (Annex 5, Art. 17, p. 10–11) proscribes 15 days for prior notice on publication, and further 15 days for issuing an objection. However, the Consortium Agreement, as the later document, overrides these stipulations and proscribes a different one as quoted here.

8.4.2 Dissemination of own (including jointly owned) Results

8.4.2.1

During the Project and for a period of 1 year after the end of the Project, the dissemination of own Results by one or several Parties including but not restricted to publications and presentations, shall be governed by the procedure of Article 17.4 of the Grant Agreement and its Annex 5, Section Dissemination, subject to the following provisions.

Prior notice of any planned publication shall be given to the other Parties at least 21 calendar days before the publication. Any objection to the planned publication shall be made in accordance with the Grant Agreement by written notice to the Coordinator and to the Party or Parties proposing the dissemination within 14 calendar days after receipt of the notice. If no objection is made within the time limit stated above, the publication is permitted.

8.4.2.2

An objection is justified if

a) the protection of the objecting Party's Results or Background would be adversely affected, or

b) the objecting Party's legitimate interests in relation to its Results or Background would be significantly harmed, or

c) the proposed publication includes Confidential Information of the objecting Party.

The objection has to include a precise request for necessary modifications.

8.4.2.3

If an objection has been raised the involved Parties shall discuss how to overcome the justified grounds for the objection on a timely basis (for example by amendment to the planned publication and/or by protecting information before publication) and the objecting Party shall not unreasonably continue the opposition if appropriate measures are taken following the discussion.

8.4.2.4

The objecting Party can request a publication delay of not more than 60 calendar days from the time it raises such an objection. After 60 calendar days the publication is permitted, provided that the objections of the objecting Party have been addressed.

(Consortium Agreement, Art. 8.4.2, p. 18)

→ In case of **publications resulting from collaborative work**, a clear distinction should be made between co-authors of the publication and non-author contributors to the research. Here we borrow from an established good practice:

> International Committee of Medical Journal Editors in its Recommendations for the Conduct, Reporting, Editing, and Publication of Scholarly work in Medical Journals (ICMJE 2023) clearly distinguishes and defines the role of authors and non-author contributors (see Defining the Role of Authors and Contributors). They recommend that authorship be based on the following 4 criteria:
>
> - Substantial contributions to the conception or design of the work; or the acquisition, analysis, or interpretation of data for the work; AND
> - Drafting the work or reviewing it critically for important intellectual content; AND
> - Final approval of the version to be published; AND
> - Agreement to be accountable for all aspects of the work in ensuring that questions related to the accuracy or integrity of any part of the work are appropriately investigated and resolved.
>
> Contributors who meet fewer than all 4 of the above criteria for authorship should not be listed as authors, but they should be acknowledged.

Therefore, all people significantly contributing to all aspects of the writing process must be signed as co-authors, while those who contributed only to the research but not to the writing process, should be only acknowledged in the publication. Furthermore, the order of authors should reflect the amount of their contribution in the writing process. All co-authors must agree on the order of authors of a publication.

→ Rights to use results or **background** (access rights) are regulated by the Grant Agreement (Annex 5, Art. 16, p. 8–10) and Consortium Agreement (Section 9: Access Rights, p. 19–22). Therefore, the person(s) conducting **analysis** of the primary research conducted by other person(s) as planned in the INSPIRE project DoA has the right to publish this analysis in the scholarly publications planned in the INSPIRE project and be undersigned as the author. Contribution of person(s) conducting primary research and gathering data must be adequately acknowledged.

‘Background’ means “any data, know-how or information — whatever its form or nature (tangible or intangible), including any rights such as intellectual property rights — that is: (a) held by the beneficiaries before they acceded to the Agreement and (b) needed to implement the action or exploit the results” (Grant Agreement, Art. 16.1: Background and access rights to background, p. 33–34). The exact Background for the INSPIRE project is defined in the Attachment 1 of the Consortium Agreement (p. 40–42).

→ **Exploitation** of the results outside of what is planned in DoA is regulated by the Grant Agreement (Annex 5, Art. 16, p. 5) and must be conducted in accordance with the Consortium Agreement (Section 8.4: Dissemination). Particularly, the Consortium Agreement (Art. 8.4.3, p. 18) stipulates that consortium partners shall not include another partner’s results (or background) without prior written approval. Therefore, the person(s) conducting **analysis** of the primary research conducted by other persons(s) as planned in the INSPIRE project DoA, and wishes to use this analysis in scholarly and other forms of publication (**not planned in the INSPIRE project**), are obliged to ask for permission the researchers who conducted primary research to use the data for that particular publication. The rules of multi-authored publications as stipulated above are applied. In case a collaborator in the primary research is not involved in the writing process, their contribution to the conducted research must be acknowledged in the publication.

Exploit(ation) is “the use of results in further research and innovation activities other than those covered by the action concerned, including among other things, commercial exploitation such as developing, creating, manufacturing and marketing a product or process, creating and providing a service, or in standardisation activities” (Grant Agreement, Annex 5, p. 3).

8.4.3 Dissemination of another Party’s unpublished Results or Background

A Party shall not include in any dissemination activity another Party's Results or Background without obtaining the owning Party's prior written approval, unless they are already published.

(Consortium Agreement, Art. 8.4.3, p. 18)

→ All collaborators on the INSPIRE project adhere to The European Code of Conduct for Research Integrity – Revised edition 2023 (ALLEA 2023).

4 Protocol & Quality Assurance Guidelines

As it has been defined in the INSPIRE **D1.1 Project Management Handbook** (Arroyo and Palmén 2022), The Quality Assurance Editors (QAEs) ensure the high quality of the project and its deliverables, by reviewing processes and outputs, identifying deviations from the set quality standards and recommending corrective actions (p. 15). The guidelines set out in this deliverable will be taken into consideration by all Task Leaders in the development of their tasks and reflected in the deliverable (see the list of Task Leaders in D1.1, Table 5, p. 14-15). For each deliverable, a different consortium member acts as Quality Assurance Editors (see the list in D1.1, Table 6, p. 16-17).

The step-by-step process to prepare deliverables which are in the form of a report is defined in the D1.1 Project Management Handbook (p. 22):

1st. The Lead Partner of the Deliverable (LPD) sends to Contributors to the Deliverable (CtDs) a draft structured outline of the Deliverable and asks them to write their contributions.

2nd. The CtDs send to LPD their specific contributions.

3rd. The LPD sends the deliverable to the QAE to be reviewed and uploads it to the Project's shared folder.

4th The QAE reviews and sends the comments to the LPD. The rest of the members of the Consortium read the deliverable and make contributions if they deem it necessary.

5th The LPD integrates the comments of the QAE and the consortium members and sends the deliverable to the Project Coordinator (PC).

6th The PC checks it and submits the final version of the deliverable to the EC.

The timing of the deliverable procedures, as stipulated in the D1.1 Project Management Handbook (Table 11, p. 22). Key dates for the preparation of each deliverable including the exact timing and responsibilities of each consortium member (as LPD and QAE) involved in deliverables production, are listed in the D1.1 (Table 12, p. 22-24).

4.1 Guidelines for the Quality Assurance Editors

In the process of reviewing each deliverable the designated Quality Assurance Editor should check three main elements of the deliverable they are in charge. This entails checking (1) formal aspects of the deliverable, (2) description of addressing the Guidelines for relevant types of activities, and (3) ascription of authorship of the deliverable.

4.1.1 Formal development of the Deliverable

Checklist

√ Check if the goal and specifications described in the DoA are effectively addressed.

√ Check if the Deliverables follows the word template in the nextcloud file WP 1/ templates.

√ Check if the Deliverable fulfils basic formal aspects:

- Good quality of English and spell check.
- Coherence and consistency within the text.
- Reference style based on **Chicago Manual of Style**. Deliverable may follow Author-Date or Notes & Bibliography version of this Style, depending on authors' preferences. Authors may deviate from the standard where meaningful (such as providing web links within body text, like in this deliverable), what is important is to be consistent throughout the document.

Chicago Manual of Style find here: https://www.chicagomanualofstyle.org/home.html. Further:

- Notes and Bibliography: Sample Citations: find here: https://www.chicagomanualofstyle.org/tools_citationguide/citation-guide-1.html

- Author-Date: Sample Citations find here: https://www.chicagomanualofstyle.org/tools_citationguide/citation-guide-2.html

√ Check if the Deliverable uses Gender Inclusive language as recommended under 2.7 Tasks involving writing reports, deliverables, analyses, and other textual outputs.

4.1.2 Consideration of the Guidelines for Different Types of Activities

Checklist

Check if the Deliverable **describes** in what ways it applied (or modified) the relevant guidelines for particular types of tasks as set out in D2.4 Strategic guidance and quality assurance, Section 2.

QAE cannot and should not comment the design of the task, but rather only check whether the recommendations for particular tasks from the Guidelines provided in this document (Section 2) have been considered and reflected upon in the Deliverable.

If there were any setbacks in applying these principles in practice, the Deliverable should describe and reflect on them briefly – negative results are as valid as positive findings for reporting and dissemination.

4.1.3 Authorship of the Deliverable

Checklist

√ Check whether authorship is rightfully and adequately ascribed to all individuals who participated in writing smaller pieces of the text within the Deliverable. Check whether authorship of the deliverable reflects the description of the task and deliverable in DoA.

Authorship could be ascribed to an individual through the following means:

- All contributors to the text are listed as co-authors, whereas the order of authors should reflect the amount of their contribution to the final version of the Deliverable.

- Deliverables could be divided in sections with reference to who is author of which part/section, and who has acted as an editor.

- If an individual contributed a particular piece of information, data or an ideas, this should be acknowledged (e.g., in a footnote).

- Persons commenting and intervening into the text should be listed as Contributors to the deliverable.

√ Check whether all authors had opportunity to view the final version of the Deliverable sent to QAE by checking the dates and names on the Document History chart at the beginning of the Deliverable.

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