



Report
2025:20

Action Plans for Gender Equality, Diversity and Inclusion in Norwegian Research Institutions

Experiences with implementation, follow-up, and evaluation

Brit Lynnebakke, Veronica Ski-Berg, and Fride Flobakk-Sitter

NIFU

Report
2025:20

Action Plans for Gender Equality, Diversity and Inclusion in Norwegian Research Institutions

Experiences with implementation, follow-up, and evaluation

Brit Lynnebakke, Veronica Ski-Berg, and Fride Flobakk-Sitter

Report 2025:20

Published by Nordic Institute for Studies in Innovation, Research and Education (NIFU)
Address P.O. Box 2815 Tøyen, NO-0608 Oslo, Norway
Visitor address: Økernveien 9, 0653 Oslo.

Project No. 21505

Commissioning authority Committee for Gender Balance and Diversity in Research (KIF Committee)
Address Norwegian Directorate for Higher Education and Skills (HK-dir)
P.O. Box 236 Sentrum, NO-0103 Oslo, Norway

Photo montage Adobe Stock

ISBN 978-82-327-0759-1

ISBN 978-82-327-0760-7 (online)

ISSN 1892-2597 (online)



Copyright NIFU: CC BY 4.0

www.nifu.no

Foreword

Over the past decade, Action Plans for Gender Equality, Diversity and Inclusion (EDI Action Plans) have been a central focus of EU and Norwegian efforts on diversity and inclusion in academia. Since 2022, research institutions that receive research funding from Horizon Europe and the Research Council of Norway are required to have a Gender Equality Plan (GEP). The number of research institutions with such plans has increased significantly since 2018. Due to these new requirements and the EU's intention to develop a framework for monitoring and evaluating the action plan efforts, there is a need for a better understanding of how the plans are implemented and followed up. In this context, the Committee for Gender Balance and Diversity in Research (the KIF Committee) issued a call for a commissioned project to map Norwegian research institutions' efforts to implement, follow up, and evaluate the measures outlined in their action plans.

The project has been carried out by three researchers at the Nordic Institute for Studies in Innovation, Research and Education (NIFU). Fride Flobakk-Sitter has been responsible for the document analysis, Veronica Ski-Berg for analysing the email survey, and Brit Lynnebakke for analysing the interviews. Flobakk-Sitter has written Chapter 3. Ski-Berg and Lynnebakke have jointly written Chapters 4 and 5. All three researchers have contributed to Chapters 1, 2, and 6.

The project team would like to thank Nora Sønstelie, Nora Tøraasen Nordvik, and Carina Høgmo for their research assistance. We would also like to thank Mari Elken and the KIF Committee's Reference Group and Secretariat for their valuable comments and input during the project and on earlier drafts of the report.

Oslo, 20 November 2025

Vibeke Opheim
Managing Director

Michael Mark
Head of Research

Contents

Summary	6
1 Introduction	11
1.1 Background.....	11
1.1.1 Key concepts	13
1.2 National guidelines and policies for EDI work.....	14
1.2.1 Action Plans for Gender Equality, Diversity and Inclusion	16
1.3 Relevant previous research.....	17
2 Methods	20
2.1 Research design.....	20
2.2 Focus group interviews.....	21
2.3 Email survey.....	24
2.4 Document review.....	26
3 Intentions in the EDI Action Plans	28
3.1 EDI measures in the action plans.....	28
3.2 Follow-up and assessment of EDI measures.....	29
3.3 Reflections on the action plans	32
3.4 Summary of document analysis findings.....	36
4 Experiences with the implementation of action plans	37
4.1 Dynamic work	37
4.2 From gender balance to EDI.....	38
4.3 Experiences with good implementation processes.....	41
4.4 Partners and resources in EDI work.....	43
4.5 Anchoring and engagement within the organisation	46
4.6 Practical challenges and dilemmas in implementation.....	52
4.7 Summary – implementation of measures.....	57
5 Follow-up and evaluation	59
5.1 Procedures for documentation and follow-up	59
5.2 Evaluation of EDI measures in the institutions.....	64

5.3	Suggestions for follow-up and evaluation of EDI measures.....	65
5.4	Possible challenges for evaluations	66
5.4.1	Quantifiable vs. unquantifiable measures	66
5.4.2	Difficult to evaluate the effect of EDI measures.....	68
5.4.3	Documentation challenges.....	69
5.5	Views on external evaluations.....	71
5.6	Summary – follow-up and evaluation of measures.....	72
6	Discussion	74
6.1	Type of measure – to quantify or not to quantify?	74
6.2	Experiences with diversity measures and documentation.....	76
6.3	Collaboration between institutions.....	77
6.4	Adjustments of EDI measures.....	77
6.5	Specific versus less specific measures	79
6.6	Anchoring and challenges with evaluation.....	79
6.7	Some thoughts on future studies.....	80
	List of figures.....	82
	References.....	83
	Appendix 1	87
	Appendix 2	89
	Appendix 3	92

Summary

Background

Action Plans for Gender Equality, Diversity and Inclusion (EDI plans) have become common in public and private workplaces over the past two decades. This is also the case for research institutions in Norway and other countries. In 2022, having a Gender Equality Plan (GEP) was introduced as an eligibility criterion for research funding from the Research Council of Norway and Horizon Europe. Accordingly, the number of action plans in Norwegian academia has increased in recent years.

At the European and national levels, plans are underway to establish a structure to monitor the impact of measures in the action plans within research institutions. At the same time, there is limited research in Norway and elsewhere on how measures in the action plans are implemented, followed up, and evaluated. This is why the Committee for Gender Balance and Diversity in Research (the KIF Committee) issued a call for a commissioned mapping project. Findings from the project are presented in this report. The project is a step towards improving knowledge of how various Norwegian research institutions implement, follow up, and evaluate measures outlined in their action plans.

Methods, data sources and key questions

The main focus of the project is on the experiences and perspectives of *EDI actors*, i.e., the individuals who have the main responsibility for coordinating and implementing EDI efforts within the organisation. In some cases, these individuals hold the title of Equality and Diversity Adviser. However, at many institutions, HR employees or management are responsible for coordinating these efforts. The study focuses on three main questions:

- 1) What kinds of experiences do EDI actors in Norwegian research institutions have with implementing measures for equality, diversity and inclusion?
- 2) What kinds of evaluations and follow-up procedures of the EDI Action Plan measures are carried out at the institutions?

3) What factors have EDI actors experienced that promote and hinder the implementation, follow-up, and evaluation of measures in the EDI Action Plans?

This study has examined these questions using three methods: six focus group interviews, an open-ended question survey (distributed to 82 individuals by email, 43 of whom responded) and a contextualising document review of the intentions of the EDI Action Plans of 76 Norwegian research institutions. In all three data sources, the sample includes universities, university colleges, research institutes, and a few government actors with R&D activities. Research institutes are overrepresented in the samples of both the document review and the open-ended question survey.

Intentions of the action plans

In the document review, we found that smaller institutions often have a narrower scope for their EDI efforts than larger institutions, e.g., in terms of which diversity dimensions their plans address. Several of the smaller institutions focus solely on gender balance, whereas the larger institutions tend to adopt a broader scope in their EDI efforts.

The action plans often indicate *who* is responsible for implementing and following up the measures. However, only a few of the institutions mention *how* they will follow up the outlined EDI measures. Even fewer action plans describe how the measures will be *evaluated*.

The document analysis highlights certain tensions regarding whether the EDI measures are grounded in practices that can be easily documented. On the one hand, it is emphasised that it is beneficial to use documentable practices as a starting point, as the efforts then become easier to measure, follow up and evaluate. On the other hand, the fact that not everything can be quantified, measured or documented poses certain challenges. Consequently, it can be difficult to assess and quantify the effect of certain measures.

Experiences with implementing the action plans

The interviews with EDI actors indicate that the action plans are a useful navigation tool in the EDI efforts. This tool is not always static. In some cases, the measures and the action plan are adjusted before the end of the action plan period as institutions gain more knowledge about which measures are appropriate and relevant. The findings also show that in institutions where the action plans have been developed in recent years, there may be a particular need to update the plans in the early phase of the efforts. Moreover, the interviews illustrate that

Norwegian and European academia has longer experience with gender balance measures than with diversity measures. Furthermore, as in the document review, the interview findings show that there can be other challenges associated with documenting the representation of certain diversity categories (e.g., disability and sexual orientation) than with documenting the representation of men and women in, for example, different types of positions.

EDI actors have experienced that several factors promote the successful initiation of measures from the action plan. In particular, EDI actors have experienced that it is important that action plans allocate the responsibility of each measure to named persons, and that management is engaged in the action plan work.

Many EDI actors expressed proficiency in the EDI work and gave examples of how the institution's EDI efforts are tweaked and improved according to the learning and experiences they gain with experience. However, they have also encountered certain challenges in their work, which was one of the main aims of this study to identify (research question 3). Some challenges are practical. One example of a practical challenge is that certain objectives in the action plans are difficult to fulfil in the short term (e.g., recruiting for gender balance when the pool of potential applicants is skewed). Another challenge is implementing universal design and accessibility in older buildings. EDI actors also highlighted several dilemmas in the EDI work. These dilemmas relate to security clearances, the representation of diversity, and communication of EDI goals and EDI terminology within the organisation. Some interviewees also shared that it can be difficult in practice to work with a broad diversity concept (i.e., a diversity concept that encompasses many human categories).

Few interviewees reported that colleagues have explicitly voiced negative attitudes towards EDI efforts. However, some reported that they have experienced indifference among leaders and other colleagues, as well as a lack of prioritisation or sporadic involvement from management.

There is considerable variation in the degree of perceived engagement from leaders. Likewise, there is variation in EDI actors' experiences of to which extent EDI efforts are entrenched in other organisational efforts and aims (anchoring). Many EDI actors reported good co-operation with different units and individuals within the institution on the EDI measures. EDI actors from several small and medium-sized organisations reported close co-operation with management. Other EDI actors have experienced limited involvement from management. However, some interviewees who encountered challenges had experienced that engagement from leadership and anchoring of EDI measures improved over time.

Some interviewees, from both large and small organisations, expressed that they feel somewhat isolated in their EDI work. In larger organisations, this sentiment does not necessarily reflect a lack of endorsement of EDI work by the

organisation's management. Instead, it may reflect that these EDI actors navigate complex organisations with many competing considerations. Furthermore, the findings show that both anchoring and implementation can be more complex in large university and university colleges than in smaller research organisations, as the work must be embedded in both the administrative and academic staff at various levels. Implementation and anchoring may thus be experienced as more cumbersome. EDI actors in such organisations have an important role as both coordinators and information hubs.

Follow-up procedures

Most respondents in the email survey reported that their organisations have follow-up procedures for the action plan's EDI measures. One in five responded that they do not have such procedures. In particular, the duty to work with and report on equality and anti-discrimination ("Aktivitets- og redegjørelsesplikten (ARP)") is used to follow up on the status of EDI measures. Other follow-up procedures include regular meetings, interaction with other bodies in the organisation, and employee feedback. Some institutions evaluate EDI measures when revising the action plan.

The survey data findings, though the sample is small, indicate that procedures for evaluating EDI measures may be more established among universities, while procedures for follow-up may be more established among research institutes and university colleges.

Evaluation procedures and views on challenges

16 of the 43 respondents in the email survey reported that their organisation does not have any procedures for evaluating EDI measures. The respondents who reported that their institution *had* evaluated its EDI efforts, detailed that this mainly involved assessing whether the measures in the EDI action plan had been implemented, rather than evaluating effects of measures.

Some measures are more difficult to measure than others, and interviewees have approached this challenge in different ways. Some expressed pragmatism, stating they had only included measures in the action plan that could be easily evaluated, while others emphasised that "less tangible" goals also were important.

Some EDI actors remarked that it can be difficult to establish causal relationships where the effects are clearly attributable to the measure and not influenced by other developments within the organisation. This can be particularly challenging in larger institutions. Some interviewees also stated that it can be difficult to disentangle the effects of the measures from the effects of broader societal developments.

Opinions on external evaluations differed among the interviewees. Some expressed that external evaluations could detract from the progress of EDI efforts in the organisation, while others said that external requirements are beneficial.

Need for in-depth studies in institutions

The final chapter of the report discusses some of the recurring topics, dilemmas and challenges across the findings. We particularly highlight findings that may be relevant to future evaluations, as the project was commissioned against the backdrop of the EU's plans to develop a framework for evaluating EDI efforts in academia.

The final chapter also highlights certain needs for further research. There is a need for in-depth studies that address work with EDI action plans from the vantage points of multiple actors within the same institution. In addition, research that aims to identify effective implementation and follow-up practices may be useful to the research sector, provided the analysis of these practices takes institutional context into account when assessing transferability. Moreover, we highlight that research on diversity in academia can benefit from insights from diversity management research, even though the latter has mainly studied other types of organisations than research institutions.

1 Introduction

1.1 Background

Action Plans for Gender Equality, Diversity and Inclusion (EDI)¹ have become commonplace in public and private workplaces over the past two decades. This also applies to research institutions, where action plans have been developed because of values of social justice and democracy, legislation on equal treatment and anti-discrimination, and a need to accommodate increased diversity among students and staff due to internationalisation and globalisation. Over the past decade, Gender Equality Plans (GEPs) have been key to the EU's efforts on diversity and inclusion (Tardos & Paksi, 2021). Research institutions that receive grants from Horizon Europe and the Research Council of Norway are currently required to have a GEP. Since 2018, Norwegian research institutions have seen a significant increase in such action plans, which appear to be partly driven by these funding eligibility criteria (Kifinfo, 30 January 2023).² There is need for more knowledge of how EDI Action Plans are implemented in research institutions.

This study explores the following research questions:

- 1) What kinds of experiences do EDI actors in Norwegian research institutions have with implementing measures for equality, diversity and inclusion?

¹ In this report, we mainly use the term "Action Plans for Gender Equality, Diversity and Inclusion", which is the translation of the Norwegian term "Handlingsplaner for likestilling, inkludering og mangfold (LIM)" that is the empirical focus of this report. In the shortened version, we use the term "EDI Action Plans" (LIM handlingsplaner) (and not the literal abbreviation GEDI) to communicate with prior research and policy discourse where the term "Equality, Inclusion and Diversity" and the EDI abbreviation is commonly used about such plans. The term "Action Plans for Gender Equality, Diversity and Inclusion" has a broader scope than the term "Gender Equality Plans (GEPs)." Therefore, we only use the term "Gender Equality Plans (GEPs)" when referring to sources (research, policy) that apply that term.

² For universities and university colleges, there appears to have been a gradual increase in the number of action plans between 2018 and 2022. For research institutes that receive basic government funding, the number of action plans increased sharply between 2021 and 2022 (personal communication with Kristin Aukland, Kifinfo).

2) What kinds of evaluations and follow-up procedures of the EDI Action Plan measures are carried out at the institutions?

3) What factors have EDI actors experienced that promote and hinder the implementation, follow-up, and evaluation of measures in the EDI Action Plans?

In this study, the term *EDI actors* refers to employees who have the main responsibility for coordinating and implementing EDI efforts within their institution (i.e., Equality and Diversity Advisers, where such roles exist; otherwise, positions primarily linked to HR and management). In addition to studying these actors' experiences, we have conducted a contextualising document review of the intentions of EDI Action Plans at Norwegian research institutions and government actors with R&D activities.

The project was carried out by researchers at the Nordic Institute for Studies in Innovation, Research and Education (NIFU) in a project that was commissioned by the Committee for Gender Balance and Diversity in Research (the KIF Committee). The background for the call was a need for knowledge about research institutions' implementation and follow-up procedures that could in the longer run contribute to the EU's plans to establish a system for evaluating the effects of the GEPs.

Although EDI Action Plans are relatively new in many Norwegian research institutions, there have been significant efforts over many years to promote gender balance in academia in Norway. Compared with many other European countries, Norwegian academia has a longer tradition of gender balance measures (Musubika & Lotherington, 2025). The Research Council of Norway's programme Gender Balance in Senior Positions and Research Management (BALANSE) provided funding for action projects in Norwegian research institutions from 2012 to 2022 (see, e.g., Owesen & Aarseth, 2022). In 2023, the Research Council of Norway expanded the target groups for this endeavour by supporting action projects for both gender balance and diversity in the new BALANSE+ programme (Gender Balance, Diversity and Inclusion in Norwegian Research).³ Similarly, the KIF Committee's mandate has been expanded in recent years, as reflected in its new name, the Committee for Gender Balance and Diversity in Research (from 2014), whereas the previous name was the Committee for Gender Balance.⁴ This expanded focus in Norway reflects a broader trend in recent years across European academia towards including additional diversity dimensions beyond gender. Diversity efforts have increasingly been placed on the agenda in academia in Europe, especially with the introduction of a GEP as an eligibility criterion for research funding (Musubika & Lotherington, 2025). Even though diversity dimensions beyond gender have been

³ <https://www.forskningsradet.no/finansiering/hva/balanse/handlingsplan/>

⁴ <https://kifinfo.no/nb/mandat-komite-kjonnsbalanse-og-mangfold-i-forskning-kif-2014-2017>

addressed through other means before the introduction of the GEP requirement, e.g., through legislatively mandated tasks (see Section 1.2), but one can expect that the action plans will strengthen diversity efforts at several institutions and lead to the introduction of new measures.

Action Plans for Gender Equality, Diversity and Inclusion should be considered in the context of key national instructions and guidelines for EDI efforts, which we will present in the next section (1.2), before we review relevant previous research in the final section of the chapter (section 1.3). At this juncture, we will first comment on the key concepts of gender equality, gender balance, and diversity.

1.1.1 Key concepts

Gender equality and gender balance

The term *gender equality* (“likestilling” or “kjønnslikestilling”) is frequently used in Norwegian legal, policy, and academic contexts. In the Norwegian Equality and Anti-Discrimination Act (see also Section 1.2), equality is defined as “equal status, equal opportunities, and equal rights”, which “presupposes accessibility and accommodation” (Section 1). As a statutory term, gender equality is central not only to EDI Action Plans but also to research institutions in general, which have an obligation to actively promote gender equality. A study of the ten largest higher educational institutions in Norway found that the term gender equality was not clearly defined in their overall strategies and action plans for gender equality (Suboticki & Sørensen, 2022). Gender balance is a more recent concept that has been used in research on gender in academia (see, e.g., Owesen & Aarseth, 2022). While the term gender balance indicates something quantifiable, such as size or weight (Suboticki & Sørensen, 2022, p. 153), other key concepts in EDI work, such as equality and inclusion, can be viewed as more abstract goals that are less quantifiable and more challenging to document. These dimensions are connected to how EDI challenges are perceived in an organisation, which may vary across contexts (for a more detailed description related to different contexts within Norwegian academia, see Suboticki & Sørensen, 2022). Different academic disciplines face different challenges in their EDI efforts. For instance, there can be differences in which social groups are underrepresented (see Statistics Norway's figures on research staff⁵).

⁵ <https://www.ssb.no/statbank/list/fouoff>

Diversity

Within research literature on diversity management (typically based on research from non-academic institutions) it is acknowledged that the diversity concept potentially can encompass a limitless range of categories. In practice, institutions commonly focus on a few key dimensions. Gender and “race”/skin colour are most commonly emphasised, although other dimensions also recur in an American context: age, nationality, ethnicity, disability, religion, sexual orientation, and one’s role in the organisation. Moreover, research indicates that diversity management often involves trade-offs between emphasising specific categories while down-playing others (Köllen, 2019).

When the issue of diversity in academia is addressed in Norway, various categories have been mentioned. In some contexts, the term “diversity in academia” has been used to denote to immigrants and their descendants (Midtbøen, n.d.), while others refer to various subgroups such as gender, “race”, ethnicity, nationality, class, sexual orientation and disability (Lagesen et al., 2025, p. 2). Thus, there is an overlap between Lagesen et al.’s (2025) description of diversity in academia and many of the dimensions that diversity management research has identified. In this report, we use the term “broad concept of diversity” to refer to descriptions in action plans and measures that include a wide range of categories. The categories Lagesen et al. mention are often used in EDI Action Plans that employ a broad concept of diversity. In addition, certain action plans refer to different religions, beliefs, socio-economic backgrounds or family situations (Pedersen et al., 2025).

1.2 National guidelines and policies for EDI work

All public organisations in Norway, including universities, university colleges (“høgskoler”), and research institutes, are required by law to actively promote gender equality and diversity. There are also requirements aimed specifically at the university, university college and research institutes. The following overview outlines key legislation and guidelines relevant to the institutions’ EDI efforts:

- **The Equality and Anti-Discrimination Act (2018)** requires educational institutions to work actively to promote equality and prevent discrimination based on gender, pregnancy, leave in connection with childbirth or adoption, care responsibilities, ethnicity, religion, belief, disability, sexual orientation, gender identity, gender expression, age and other significant characteristics of a person. The Equality and Anti-Discrimination Act came into force on 1 January 2018, replacing four previous acts.
- **The activity duty and the duty to issue a statement** (“Aktivitets- og redegjørelsesplikten”, ARP) is laid down in Sections 24-26 of the Equality

and Anti-Discrimination Act and requires all public employers and all private employers with more than 50 employees to “make active, targeted and systematic efforts to promote equality and prevent discrimination”. For the sake of readability, we hereafter refer to this duty as “the duty to work for and report on equality and anti-discrimination” or “the annual report on equality and anti-discrimination”, depending on the context. The duty involves investigating whether there is a risk of discrimination or other barriers to equality; analysing the causes of the identified risk; implementing measures to counteract discrimination and promote greater equality and diversity; and evaluating the results of these efforts. These efforts must be documented, primarily in the annual report or in another public document. In this report, the employer must disclose the current status of gender equality within the organisation, as well as the efforts that are being made to address all forms of discrimination. From 1 January 2020, a legislative amendment took effect to strengthen the duty to work for and report on equality and anti-discrimination.

- **The Universities and University Colleges Act (2024)** makes several references to the Equality and Anti-Discrimination Act. Among other things, Section 7-1 specifies that “Universities and university colleges shall actively, purposefully and systematically pursue gender equality, other forms of equality, and prevent discrimination”.
- **The Research Council of Norway's requirement for action plans on gender equality (GEP), effective from 2022**, requires all applicants from research organisations and the public sector to submit a gender equality action plan in order to receive funding from the Research Council. The Research Council has the same requirements as the EU (see further details in Section 1.2.1).

There are also other requirements, guidelines and resources for EDI efforts relevant to universities, colleges and research institutions. Among other things, institutions must comply with the Norwegian Working Environment Act, which has a separate chapter on protection against discrimination (Working Environment Act, Chapter 13). Furthermore, in 2019, Norway introduced a new strategy to promote equality for individuals with disabilities (Ministry of Culture, 2019).

In 2004, the Ministry of Education and Research appointed a separate committee for integration measures, which is now known as the Committee for Gender Balance and Diversity in Research (the KIF Committee). The Committee seeks to raise awareness of issues related to diversity, inclusion and harassment, and it recommends measures to promote gender balance and diversity at universities, university colleges and research institutes in Norway (Kifinfo, n.d.). The Norwegian Directorate for Children, Youth and Family Affairs (Bufdir) has also published

numerous guides and guidelines to support public authorities and employers in their efforts to promote equality and combat discrimination. Among other things, they have prepared templates for action plans and a guide for fulfilling the duty to work for and report on equality and anti-discrimination (Bufdir, 2021). The Equality and Anti-Discrimination Ombud (LDO) works to promote true equality and prevent discrimination. It provides guidance on legislation and acts as an advocate for equality and diversity. The Ombud is also responsible for the guidance and follow-up of the duty to work for and report on equality and anti-discrimination, which may include follow-up visits to organisations (Equality and Anti-Discrimination Ombud, n.d.).

There are also several international requirements, guidelines and resources for work on gender equality, diversity and inclusion. Norway is committed to the UN's Sustainable Development Goals, one of which involves gender equality (UN, n.d.). Furthermore, the EU has strengthened its commitment to gender equality and gender balance in research through the introduction of the EU Framework Programme for Research and Innovation (Horizon Europe). This is reflected, for example, in the requirement of having a Gender Equality Plan (GEP) to qualify for research funding. As previously mentioned, the Research Council of Norway also refers to the EU's requirements for action plans in its own funding requirements (see more in Section 1.2.1). Norway is also part of the European Research Area (ERA), which has an explicit goal to achieve gender equality in research and innovation (Council of the European Union, 2015). In these efforts, the importance of action plans for gender equality and inclusion is emphasised.

Altogether, these acts and guidelines provide a framework for the research institutions' efforts to promote gender equality, diversity and inclusion. It is worth noting that institutions are obliged to comply with some of the above acts and regulations. Others serve as guidelines or instruments, such as the EU's and the Research Council's requirements for gender equality action plans, which are only required for funding and are therefore optional for the institutions.

1.2.1 Action Plans for Gender Equality, Diversity and Inclusion

As stated in the Equality and Anti-Discrimination Act, all higher education institutions and research institutes (both public and private) are obliged to make active, purposeful and systematic efforts to promote gender equality. This is also reflected in the fact that the Research Council of Norway and the European Commission (through Horizon Europe calls for proposals) require all research funding recipients to have a Gender Equality Plan, GEP. Today, almost all Norwegian research institutions have such a plan. The requirement mandates that action plans are made accessible to the public on the institution's website, reference designated

resources for gender equality efforts, and demonstrate how this work is supported through training and skills development. In addition, the action plans must include information on how the work will be followed up and monitored (Research Council of Norway, 2021).

In addition to the mandatory requirements for GEPs, the European Commission (European Institute for Gender Equality, n.d.; Kifinfo, n.d.) recommends including the following focus areas in the plans:

- Organisational culture and work-life balance
- Gender balance in management and decision-making
- Gender balance in recruitment and career development
- Integration of a gender perspective in research and teaching content
- Measures against gender-based violence and sexual harassment

These five points are considered key factors for gender equality in research and innovation. The European Commission also emphasises that the action plan should be designed as a strategic instrument, which establishes priorities and specific objectives that encompass the entire organisation (European Institute for Gender Equality, n.d.).

1.3 Relevant previous research

This report is empirical and does not analyse its findings based on a specific analytical or theoretical framework (e.g., implementation theory, institutional theory, or inclusion/exclusion theory). The project is relatively brief and has limited resources. Our priority has been to collect as much data as possible within the project's scope and to conduct a thorough empirical thematic analysis. We consider this study an important first step in an under-researched field, where there is a need for knowledge of experiences and practices across various research institutions. Whilst the report does not emphasise theoretical analysis, it is relevant to contextualise the study's findings and themes in light of relevant previous research and to suggest literature for further investigation.

Research on the implementation of Gender Equality Plans (GEPs) in European academia is in its initial stages, although many such plans already exist (Kalpazidou & Pedersen, 2025; Tardos & Paksi, 2021). So far, research on such action plans has focused more on the causes of gender imbalance and diversity, while little research exists on the implementation of measures and on the impact of gender equality and diversity measures in research organisations (Tardos & Paksi, 2021; Egeland & Drange, 2022). However, the journal *Social Inclusion* has recently published a special issue on GEPs in European countries, where implementation

is the subject of several articles (Tardos et al., 2025).⁶ We will now present some of the findings and analytical perspectives in the special issue that are of relevance to our findings.

So far, research suggests that gender balance and diversity in academia are promoted by institutional changes where higher management levels are involved (Tardos et al., 2025). Vilhena et al. (2025) argue that two types of measures are needed for change to occur: 1) measures that involve structural change, e.g., related to policy, and 2) “preparatory measures”, i.e. measures to prepare the foundation for change, such as raising awareness. Furthermore, they argue in favour of a balance between these types of measures (Vilhena et al., 2025, p. 6).

Some of the articles in the special issue of *Social Inclusion* on GEP plans note that institutional change processes are non-linear and unpredictable (Vilhena et al., 2025; Kalpazidou Schmidt & Pedersen, 2025; see also Nadiv & Kuna, 2020). Therefore, it is argued, EDI actors and other change agents must choose strategies that “adapt to shifting contexts and emergent opportunities” (Vilhena et al., 2025; p. 6). This research literature recommends tailoring policies, types of measures and perspectives to the context of the institutional change efforts, so that the policy goals are relevant to the institution where they are implemented. At the same time, it is recommended to maintain a common understanding to effectively follow up and monitor these measures (Vilhena et al., 2025, p. 7). Furthermore, it is emphasised that it can be challenging to transfer experiences from a successful intervention in one context to another. This is because the context can change, the work involved may be unpredictable and non-linear, and one cannot always expect the same approach to succeed in different settings (Vilhena et al., 2025). It is important to keep these precautions in mind when considering the transferability of evaluation results of EDI efforts from one institutional context to another.

Based on experiences from five US research institutions (summarised after an intensive month-long diversity management course), Brooks et al. (2018) recommend that the implementation of action plans are supported by 1) accountability, e.g., through reporting and hiring targets; 2) good infrastructure where diversity and inclusion is prioritised by senior leadership and different organisational units; 3) incentives for change; and 4) allocated resources.

According to Musubika and Lotherington (2025, p. 2), although the GEP work at the EU level has broadened to include a focus on diversity, GEPs in European academia tend to prioritise gender. Other aspects of diversity, such as ethnicity and issues related to belonging, are often inadequately addressed. Musubika and Lotherington argue that in the European Commission's work on DEI (Diversity, Equality and Inclusion), the approach to diversity appears to be characterised more by rhetoric than by systematic efforts, in contrast to the Commission's work

⁶ <https://www.cogitatiopress.com/socialinclusion/issue/view/424>

on gender equality. Musubika and Lotherington exemplify this through the European Commission's *She Figures* report. In Norway, far more studies exist on efforts to promote gender equality in research⁷ than on diversity. Research on staff diversity in academia has been limited with a few exceptions such as Flikke (2024), Maximova-Mentzoni et al. (2016), Askvik and Drange (2019), and Erdal et al. (2019)⁸. Studies on diversity *measures* within Norwegian academia are even more scarce.

In contrast, there is a vast body of literature on diversity management in HR and management research, where academic institutions are less frequently examined (see e.g., Triana et al., 2021 and Seliverstova, 2021). It can be fruitful to bring theoretical and empirical insights from this field of research into the relatively new field of research on diversity efforts in academia. Although research institutions, and particularly higher education organisations, have a number of unique characteristics compared to other types of organisations, studies on diversity management have extensively addressed several foundational issues that can also be applied to analyses EDI efforts in academic settings (see e.g., Bond and Pyle, 1998).

In the next chapter, we present the project's research design and methods. Following this, we present the findings from the document review of the action plans in Chapter 3. In Chapters 4 and 5, we discuss findings from the interviews and email survey on experiences with the implementation, follow-up and evaluation of EDI Action Plans. In the final chapter, we highlight key findings across the methods, discuss findings on challenges encountered in the work (especially challenges concerning evaluation), and identify areas for further research.

⁷ For examples, see Holter and Snickare (2022) and NORDICORE's overview: <https://www.samfunnsforskning.no/core/nordicore/publikasjoner/Tidsskriftsartikler-og-bokkapitler/index.html>

⁸ In contrast, significant research exists on students' inclusion, exclusion, and study programmes, particularly regarding descendants of immigrants.

2 Methods

2.1 Research design

The study employed three methods to address the three research questions: focus group interviews, an email survey with four open-ended fields, and a document review.

The opportunities for advancing gender equality differ among the research institutions based on their size, social missions, and structural conditions (Egeland, 2023). In order to acquire knowledge that can support the EU's long-term goal of developing parameters for evaluating GEP measures, it is important to study experiences from different institutional contexts. We therefore included a broad range of institutions in the sample for the email survey and interviews. These were selected with consideration for the type and size of institution, academic subject areas, and geographical location.

The interviews and email survey provide insight into the experiences and perspectives of individuals who are particularly involved in EDI implementation efforts. In many cases, the interviewees had also been involved in – and sometimes responsible for – developing the EDI action plans. Some had also been involved in the evaluation of the EDI work in the institution. The data does not offer insight into the perspectives of different actors within the same organisation. Clearly, this would provide very valuable information, but this was not feasible within the scope of the project. However, the findings can provide insight into the unique experiences and challenges these actors have in EDI work, including their experiences of cooperation with other actors in the organisation. We would also like to note here that the study has not been designed to systematically investigate best practices, although we have posed questions to EDI actors about their experiences of both what works well and what does not.

The primary purpose of the document review was to contextualise the findings on EDI actors' experiences and perspectives. The purpose of using both a qualitative email survey with open-ended questions and focus group interviews was to gather complementary data. The email survey was aimed at assessing whether an evaluation was conducted and to examine the institutions' procedures for

following up EDI work. In addition, the responses to the email survey provided a broader range of experiences and perceptions from various Norwegian research institutions, to supplement the findings from the interviews on these topics. The main purpose of the focus group interviews was to provide in-depth knowledge of EDI actors' experiences and perceptions. The conversational style of focus group interviews can encourage the collection of rich data on challenges and barriers. The method also provides an opportunity to ask follow-up questions and examine how actors themselves frame issues in their field as the conversation develops between the participants. In the following chapter sections, we present the procedure for each method in more detail.

2.2 Focus group interviews

In this project, we conducted a total of six group interviews using Teams. Each interview had 2 to 7 participants. In total, we spoke with 21 interviewees from 19 institutions. Two of the interviews included two interviewees, while the others had more participants. If an organisation had an EDI adviser, we contacted them. Where these did not exist, we contacted management – primarily for smaller organisations, or HR, to determine who was closest to the implementation efforts in the organisation, if this was not specified on the institution's website. We specified that we were seeking individuals who work with EDI at higher organisational levels, rather than at lower levels such as departments, faculties, or divisions. Additionally, prior to these inquiries, the KIF Committee helped identify key individuals involved in the work for the focus groups and survey by contributing to an Excel sheet listing all the institutions. In cases where the KIF Committee had identified a relevant person, we contacted them directly (to be clear, the KIF Committee was not informed of our sample for the interviews).

In most of the interviews, one person from the institution participated in the interview alongside other participants from other institutions. From a few institutions, two EDI actors from the same institution joined the other participants.

Different types of positions are represented in the sample. Most participants were either EDI advisers or HR employees, while few were in management positions. Some interviewees were also members of their institution's EDI committee. The interviewees therefore have different roles within the institution, different regular collaborators and varying levels of access to other individuals involved in EDI work (such as other EDI committee members). They also have varying degrees of power and decision-making authority within the organisation. Table 2.1 below shows the distribution of interviewees and institutions in the group interviews.

Table 2.1 Distribution of institutions and number of interviewees in the group interviews

Group interview 1	3 interviewees, university
Group interview 2	3 interviewees, research institute
Group interview 3	2 research institutes 1 government actor with R&D activities
Group interview 4	2 universities
Group interview 5	7 interviewees from 5 university colleges
Group interview 6	2 university colleges
Total	19 interviewees

As illustrated in the table, two interviews were conducted with EDI actors at universities, two with university college interviewees, one at a research institute, and one involving both research institutes and a government actor interviewee. We spoke with interviewees from five universities, five research institutes, one government actor with R&D activities and seven university colleges. Both large and small universities are included in the sample. The interviewees work in different regions of Norway: Southern Norway, Western Norway, Eastern Norway, Northern Norway and Central Norway. We also aimed to ensure geographical diversity within the main institution categories (universities, university colleges and research institutes). In addition, various academic fields are represented among the research institutes and university colleges (in terms of the institution's overall profile). To protect privacy, we will not give a detailed account of the academic fields represented in the sample. However, we can state that the sample includes the broader categories of technology, social sciences, humanities, and environmental and nature research.

Many of the interviewees have worked in the EDI field of the organisation for many years, while others have held this responsibility for a shorter time (less than three years). Some of the interviewees have a professional background in the EDI field, through higher education and/or previous positions in other sectors.

The project manager recruited the interviewees by email with attached information about the project (see Appendix 1). The selection aimed to ensure variation in the sample, based on the criteria outlined in section 2.1. All EDI actors whom we contacted with a request for an interview agreed to participate. In our experience, this is quite rare, as recruiting interviewees is increasingly time-consuming, as it requires contact with new people and repeated reminders. We mention this because the interest in participating in a one-and-a-half-hour group interview may signal not only a commitment to EDI work, but also a need for and interest in exchanging experiences with other participants in similar roles.

In the interviews, we followed an interview guide (see Appendix 2). The main themes of the interview guide were as follows:

- Introduction round (position, experience, collaborative partners)

- General experiences: What works well/ What are the challenges?
- Experiences with implementation
- Experiences with and views on evaluation (and reporting, if extra time)

After the introductory round, we encouraged the participants to engage and comment on one another, to facilitate the conversation to unfold as an exchange between them. In this way, we aimed to make use of one of the common advantages of group interviews, i.e., that they often yield more naturalistic data and deeper insights into the participants' perspectives and discussions compared to individual interviews (Kvale, 2007).

We set aside 1.5 hours for each interview. In most cases, we utilised the full allotted time, while some interviews lasted around one hour. In all but one of the interviews (which had two participants), two researchers were present. One researcher took an active role in the conversation, leading the interview and asking follow-up questions. The other researcher primarily assumed an observer role most of the time, ensuring that the themes in the guide were addressed, and also noting a few relevant follow-up questions. In most interviews, this researcher asked follow-up questions at the end of the interview, but in some, questions were also asked during the interview itself.

We recorded all Teams interviews with the consent of the interviewees. After completing the interview, the recordings were stored in a digital folder accessible only to the research team members and a student assistant at NIFU. We auto-transcribed the recordings using the Good Tape programme. The transcriptions were reviewed by either a student assistant or researcher against the recording for adjustments and corrections.

All three researchers on the team participated in some of the interviews, read through the interview logs, and noted their first impressions of key themes and interesting tensions in the data, which we then discussed in the research team. We presented some of these initial analyses in a meeting with the reference group from the KIF Committee. In the next stage of the analysis, one of the researchers coded all the interviews in the qualitative analysis programme NVivo, based on the research questions and relevant recurring themes that emerged in the data, and made memos about overarching themes. The findings on the most central codes in NVivo were summarised and laid the foundation for the thematical organisation of the interview findings in the report. Here, some of the text from the team's documents about first impressions of the interview findings was also integrated. Where appropriate, the interview findings were integrated with the email survey results under the same headings. For topics where we had more findings from the email survey than the interviews, we supplemented the main text about the survey results with findings from the interviews, while using the codes from the email survey (see Section 2.3 for details about the survey data analysis).

When we present statements from interviewees in the report, we sometimes refer to them as “this person” or “the interviewee” when the combination of gender information and other information about the interviewee’s institutional affiliation can make them easily recognisable. Otherwise, we use “she” or “he”. In a few cases, we have omitted details about the interviewee's institution type or referenced a more general category of institution, for reasons of anonymity.

When quoting interviewees, we have occasionally made minor adjustments to enhance the readability of spoken language, such as reordering words or omitting common fillers in spoken language, such as “like” or “kind of,” while preserving the original meaning.

2.3 Email survey

To include a broad range of research institutions in the sample of this study and to better understand the scope of evaluations and follow-up actions that are carried out in Norwegian academia, we sent a brief qualitative email survey to 78 Norwegian research institutions. The survey was sent to all universities and university colleges in Norway that are members of Universities Norway (33 institutions); research institutes that receive basic government funding (33 institutions); four government research institutes, and eight government actors that engage in R&D activities (the latter institution type does not have R&D as their primary activity).⁹

The email survey was sent to EDI advisers where they exist. Otherwise, we identified the most relevant person through information from the KIF secretariat (see 2.2), the web page or through direct contact with the institution. In the latter cases, we primarily contacted HR manager or senior management and asked about which person was closest to the EDI work in the institution and to whom we could therefore send the survey.

The email survey was sent using the Qualtrics programme and had four open-ended fields (that each had one page in the Qualtrics form). The questions in the four fields were as follows:

1. What are your experiences with implementing the measures in the institution's action plan for gender equality, diversity and inclusion? What has worked well/not so well?
2. Does your organisation have procedures in place for documenting the follow-up of measures in the action plan? If yes, please elaborate
3. Has your institution conducted an evaluation/evaluations of the work with implementing the measures in the action plan? If yes: What kind of

⁹ The foundation of the sample was the KIF committee's list in their website “Action Plans for Equality, Diversity and Inclusion <https://kifinfo.no/nb/content/handlingsplaner-likestilling>

evaluation(s) have been conducted? Were some measures more suitable for evaluation than others? Were any measures difficult to evaluate?

4. What is your employment position? Can you briefly describe your role, if any, in the equality, diversity and inclusion work at your institution?

As shown above, there are several questions related to the same topic under some of the numbers. The aim of the survey was to get narrative responses where participants also could share any reflections in a written “conversational” form to provide additional qualitative data on EDI actors' experiences and perceptions, while including a broader range of institutions in the email survey than in the focus group interviews.

The survey was sent to 82 people. Of these, 56 people opened the Qualtrics form, and 43 responded to the survey. Among the 43 people (hereafter referred to as “respondents”), five are affiliated with universities, eleven with university colleges, two with government actors with R&D activities, and 25 with different types of research institutes. The respondents included eight directors, nine managers, 20 advisers – four of whom were EDI advisers – and six people in other positions (e.g., programme managers and HR staff). Several respondents currently participate in an EDI committee or have previously participated in an EDI committee. Nine of the respondents also participated in the focus group interviews, which we have taken into account in the analysis in Chapters 4 and 5.

Figure 2.1 illustrates the distribution of the 43 respondents who completed the email survey. This figure shows, among other things, that the majority of responses to the email survey came from research institutes (including various types of institutes).

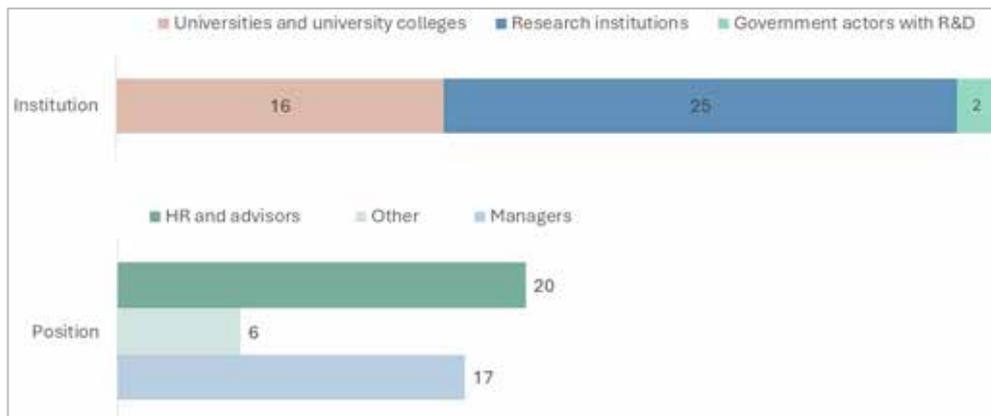


Figure 2.1 Number of respondents who completed the email survey, broken down by institution type and position

We conducted a thematic analysis of responses to the email survey. First, the respondents' answers were sorted deductively and divided into the four survey

themes (listed above). We then conducted a qualitative analysis, during which sub-themes related to the implementation, follow-up, and evaluation of EDI measures were identified. We were particularly interested in identifying responses that were similar to one another, or that differed across, e.g., types of institutions. The themes were subsequently triangulated with findings from the interviews and document analysis, and the identified themes were refined further through the synthesis of results across data sources.

The interviews were conducted prior to the email survey. As mentioned, some of the respondents (nine people from eight institutions) also participated in the interviews. When we refer to overlaps in the findings from the email survey and the interviews (in Chapters 4 and 5), we have checked to make sure that we are not referring to the same persons.

2.4 Document review

We conducted a document review of 76 action plans for gender equality, diversity and inclusion. The aim has been to investigate whether the institutions describe intentions of follow-up and evaluation of the EDI measures that are outlined in the plans. The analysis is based on the current EDI Action Plans of all 33 universities and university colleges in Norway that are member institutions of Universities Norway, as well as the 33 research institutes that receive basic government funding. In addition, we examined the action plans of four government research institutes and eight government actors with a primary purpose other than research and development (R&D).¹⁰ An overview of all 78 institutions can be found in Appendix 3.

Most of the action plans have been made available to the public on the institutions' website but we have also obtained a few action plans by contacting the institutions directly. In total, we collected and analysed the action plans of 76 of the 78 institutions. The last two action plans were either not sent to us or were not published.

The action plans were reviewed to investigate whether the institutions have EDI measures and how the work is intended to be followed up and evaluated. As 76 action plans were reviewed, the document analysis was primarily quantitative. This means that the focus was on investigating how many action plans mention, for example, the follow-up and/or evaluation of EDI measures, rather than going into depth on the actual content of the measures. In the cases where we have analysed the actual content of the measures, it has been to determine which groups they target and whether this reflects a narrow or broad perspective on diversity.

¹⁰ The 78 institutions correspond to the action plans listed on the KIF Committee's website: <https://kifinfo.no/nb/content/handlingsplaner-likestilling>

To find this information, the documents were read, and relevant keyword searches, such as “measures,” “follow-up,” and “evaluation,” were performed directly within the documents. Results and text extracts for each action plan were recorded in a matrix, and selections were summarised and the information analysed to investigate trends across the material.

Whilst the document analysis can help shed light on the *intentions* outlined in the institutions' action plans, it cannot say anything about whether these intentions are realised in practice. However, findings from the document review can complement those from the qualitative interviews and email survey, as the latter addresses experiences and perceptions that arise from the practical work of implementing the measures outlined in the action plans. The document review can thus help to contextualise the institutions' experiences with implementing and evaluating measures in their EDI Action Plans.

In the document analysis, we have only examined the institutions' EDI Action Plans. All institutions must have such a document available, which ensures that we have an equal basis for comparison across the institutions. However, it should be noted that several institutions also refer to their EDI work in other documents, such as annual plans, personnel procedures, personnel and pay policies, accessibility action plans and/or action plans against sexual harassment. Several institutions also mention their EDI work (including results and achievements related to EDI goals) in their annual status reports or annual reports. While reviewing such extensive document material would have been interesting to analyse to further understand the institutions' EDI efforts, it exceeds the scope of this project.

3 Intentions in the EDI Action Plans

We found and included 76 out of 78 action plans in the document analysis. The action plans were from all universities, specialised university colleges, accredited university colleges and research institutes with basic government funding. In addition, we examined the action plans of government research institutes and government actors with a primary purpose other than research and development. This means that the majority of the sample is composed of research institutes with basic government funding (33), compared to the other institutional categories (see Appendix 3). As the findings show, we sometimes identify differences among the action plans by institution type, which are then highlighted.

3.1 EDI measures in the action plans

As previously mentioned, universities, university colleges and research institutes are required to actively, purposefully and systematically pursue gender equality, other forms of equality, and prevent discrimination, in accordance with the Equality and Anti-Discrimination Act. This is also reflected in the fact that the institutions have developed their own action plans for gender equality, diversity and inclusion. The plans describe the goals and measures of EDI efforts and outline responsibilities and necessary resources to realise the institutions' ambitions in this area.

Findings from our document analysis show some variation in the scope of the plans and in the detail with which the EDI work is described. There are also differences in how goals and measures are formulated in the various action plans. Almost all institutions with action plans (73 out of 76) include EDI measures, which are often presented in tables or bulleted lists (see figure 3.1). Furthermore, EDI measures are often distributed across, for example, different institutional sections and activities (such as faculty and centre levels, recruitment and development), different focus areas (such as international staff and students), or thematic areas (such as gender balance, ethnicity, and disability). Some institutions also link the measures to various sub-goals, specify who is responsible for them, and/or set deadlines for the measures. A small number of institutions also indicate other aspects for each measure, such as mapped status, reporting and/or deviation from objectives.

Examining the action plans and EDI measures by institution type – universities, scientific and accredited university colleges, private and governmental research

institutes, and government actors with primary purposes other than R&D – reveals minimal differences among them. However, several smaller institutions (including accredited university colleges and research institutions) tend to have a narrower focus in their EDI efforts than the larger institutions. For instance, many smaller institutions focus solely on gender balance, while larger institutions tend to adopt a broader scope in their work on equality, diversity, and inclusion.

Measures are often generally and broadly formulated

When examining the goals and measures in the action plans, our analysis indicates that many measures are aimed at specific groups. Measures related to inclusion of various forms of gender underrepresentation are particularly prominent.

It is also apparent that many of the measures are relatively general and broad. For example, many of the measures are aimed at *everyone*, regardless of the grounds of discrimination, and can therefore be linked to a broad diversity perspective. Typical examples of formulations include: “Diversity must be taken into account in recruitment processes”, “we must give all employees equal opportunities for career development”, and “the departments must ensure that students are not discriminated against when participating in internships, project work, academic conferences/networks and the like” (from three of the institutions' EDI Action Plans). The fact that many of the EDI measures in the institutions' action plans are designed to be relatively broad and general is also supported by other studies (Pedersen et al., 2025; Lagesen et al., 2025; Musubika & Lotherington, 2025).

Some institutions explicitly state that designing broad, general measures was a deliberate choice, as these allow for adjustments during the planning period. This is illustrated by the following excerpt:

Measures and goals in the action plan are broadly formulated and designed to ensure that, during the period, it will be possible to add further measures and activities based on analyses and mappings (EDI Action Plan).

Other institutions emphasise that it is challenging to create an action plan for equality, diversity, and inclusion that balances “the overarching and guiding” with “the specific”. Examples of this challenge will also be presented in the following sections, and will therefore be discussed in more detail at the end of the chapter (see Chapter 3.3).

3.2 Follow-up and assessment of EDI measures

Although nearly all institutions have EDI measures in their action plans, fewer include clear descriptions of how the measures are to be followed up and/or evaluated (see figure 3.1).

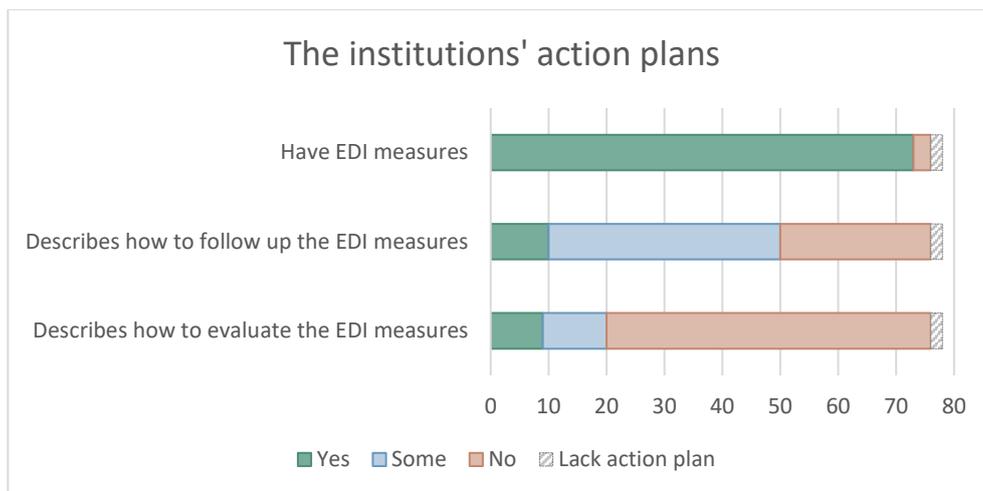


Figure 3.1 The institutions' action plans and the extent to which they describe measures for equality, diversity and inclusion.

In terms of follow-up, the document analysis shows that only ten institutions provide a clear description of how EDI measures are to be followed up, while 26 do not mention follow-up at all. The remaining 40 institutions mention follow-up of the measures to a minor extent (see figure 3.1). This is often done by referring to *who* is responsible for implementing and following up the measures, without describing *how* follow-up should be conducted. Among the various institution types, universities have the most detailed descriptions of EDI follow-up in their action plans (see figure 3.2).

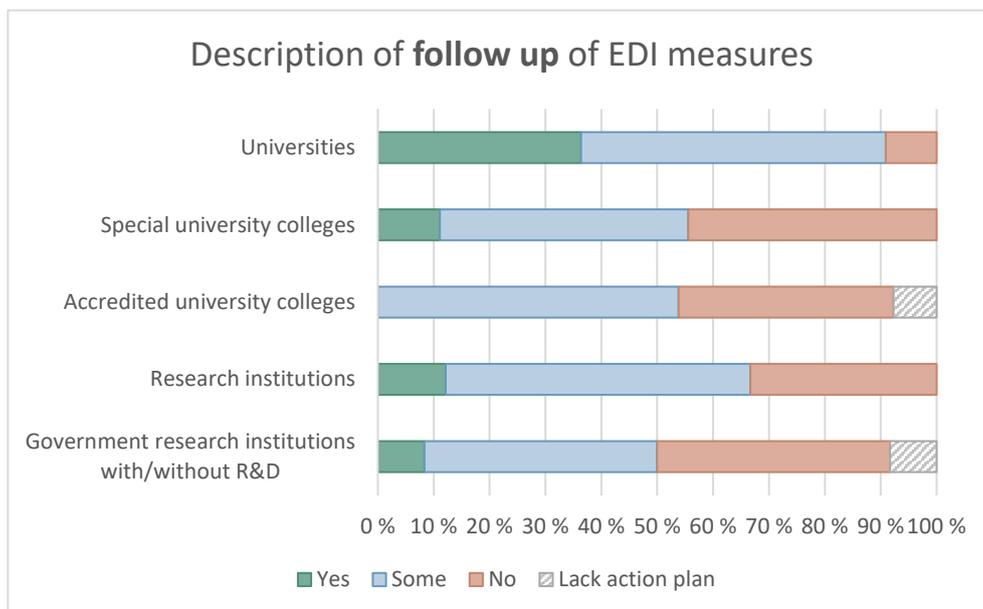


Figure 3.2 Description of follow-up of EDI measures in the institutions' action plans

As noted, relatively few institutions outline how EDI measures are to be followed up. Even fewer explain how they are to be *evaluated*. A clear description of the

evaluation work can be found in only nine of the institutions' action plans, and a further eleven institutions provide sparse information about the evaluation of the measures. The remaining 56 action plans mention no evaluation of the EDI measures (see figure 3.1). If we look at how this is distributed by institution type, we see marginal differences, and what stands out is that few describe how the EDI measures should be evaluated. Action plans that include at least some descriptions of how the measures are to be evaluated can be found at a few research institutions, accredited university colleges, and universities (see figure 3.3).

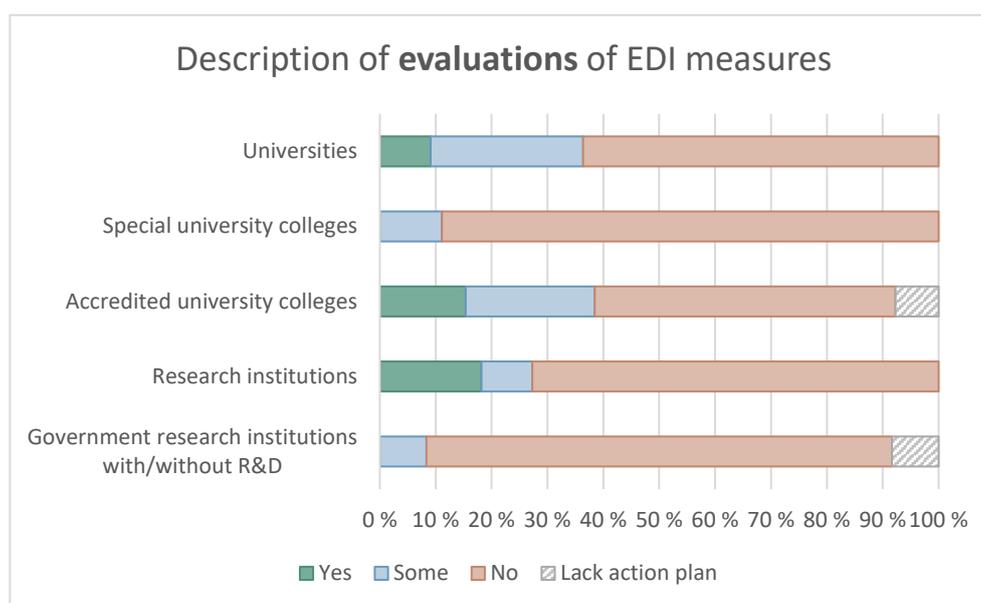


Figure 3.3 Description of evaluations of EDI measures in the institutions' action plans

One possible explanation for why some accredited university colleges and research institutions mention the follow-up and evaluation of EDI measures in greater detail may be the focus of their measures. Many of these institutions are relatively small, and the smaller ones typically focus on EDI efforts aimed at achieving gender balance, whereas larger institutions tend to work on a broader scale. The number of women and men in different job or salary categories is easier to state and count than equality on the basis of ethnicity, disability or sexual orientation. This makes it easier to describe how measures to improve gender balance are to be followed up, reported, and evaluated when reporting targets. In comparison, it can be more challenging to describe how to follow up and evaluate measures to increase awareness and acceptance with respect to ethnicity, disability or sexual orientation, as these are difficult to quantify.

The fact that it is easier to follow up and evaluate certain measures than others is evident in the action plans, which include a broad range of EDI measures but only describe how increased gender balance is to be reported, followed up and

evaluated. Although this often remains unsaid in the institutions' action plans, we do find a few plans that explicitly address these challenges, as in the following excerpt:

For privacy reasons, only gender equality is to be reported quantitatively, in accordance with the reporting duty. The main challenge associated with mapping the status and thus identifying challenges across all grounds of discrimination, apart from gender, is therefore related to poorly developed or non-existent data. Not all grounds of discrimination can or should be statistically analysed. This limits the ability to monitor developments and set targets. Therefore, to begin addressing these areas, the starting point must be perceived status or an intention to develop an organisational culture and an environment for employees and students characterised by diversity, irrespective of any measured status (EDI Action Plan from a university).

This brings us to a recurring challenge in the action plans: namely, what can and cannot be measured. This is discussed in more detail in the next section.

3.3 Reflections on the action plans

Findings from the document analysis highlight several points that warrant further discussion. To highlight these findings, we will link key findings from the document analysis with other key reflections and previous research in the field. Some of the reflections we wish to highlight are that the design of EDI Action Plans must be viewed in the context of national legislation and guidelines, and that the process and planning work can be structured into several phases. Also, many find it challenging to balance documentable practices and what can and cannot be quantified.

Action plans in light of national legislation and guidelines

The first thing that should be emphasised is that the institutions' action plans should not be viewed in isolation. The action plans are written in a broader national context and can also be read as a “response” to national legislation and guidelines for efforts to promote gender equality in higher education and research (Pedersen et al., 2025). This concerns not only the prioritisation of developing specific action plans for selected areas (such as gender equality, diversity and inclusion), but also how these topics are defined and which elements are emphasised. This entails that many of the institutions' action plans reflect the legislation, for instance, by using similar definitions or focusing on the same aspects in their work on equality, diversity and inclusion. We also see this in our document analysis, and this is supported by similar studies (Pedersen et al., 2025).

Lagesen and colleagues (2025) report similar findings, noting that when institutions adopt and incorporate external directives, definitions, and guidelines for diversity into their EDI Action Plans, it can help create what they call “authoritative polyphony” (Lagesen et al., 2025). As a result, the message conveyed by the action plans becomes so diffuse that it can prevent a meaningful local response. Our review shows that in some plans the number of EDI measures are formulated so broadly and generally that they appear difficult to operationalise and implement in practice.

Process and planning work with EDI measures

Another aspect that is worth highlighting concerns the institutions' processes and planning work on EDI measures, and how this is reflected in their action plans. There is no set formula for how this process should proceed and what it should entail. However, a comprehensive process usually includes some form of needs assessment, analysis and design of measures, implementation, follow-up, evaluation and a possible revision of the measures. Figure 3.4 illustrates what a comprehensive process and planning for EDI measures *can* look like. The model is based on descriptions in some of the institutions' action plans and is intended here mainly as an illustration of the different steps that can be involved in working with EDI measures.

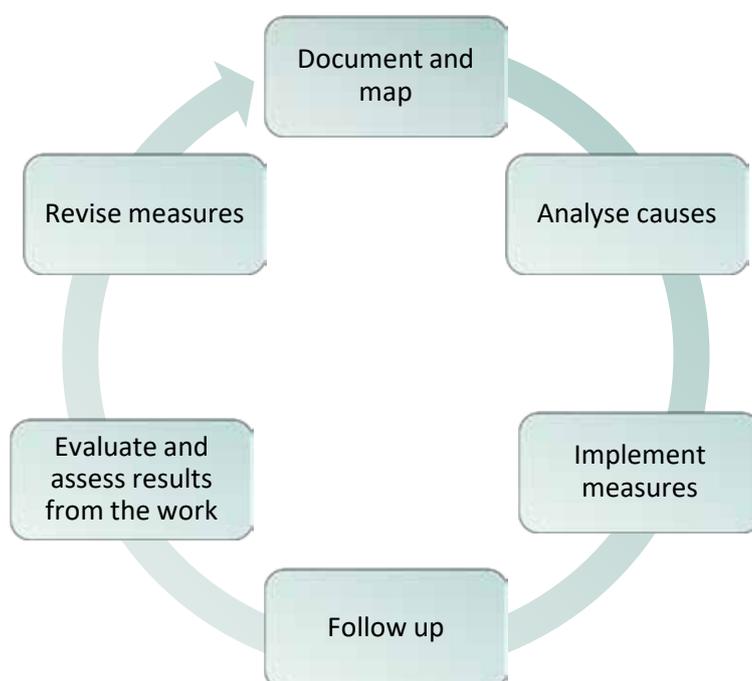


Figure 3.4 Illustration of what a comprehensive process and planning for EDI measures can look like

Many of the action plans refer to mapping, status and reports related to gender equality, diversity and inclusion at the institution. However, there is a difference between mapping that is carried out *before* and *after* the work on EDI measures (see figure 3.4). This planning process involves documentation. On the one hand, documentation, mapping, and analyses can be conducted in advance to determine which measures should be designed and implemented to counter discrimination and promote gender equality and diversity. On the other hand, documentation and reporting can be carried out *during* and *after* the implementation of measures. These are often based on follow-up throughout the process and on the assessment and evaluation of the work once it is completed. To close the circle, what emerges from an evaluation can be carried into the next round of mapping, allowing measures to be adjusted if necessary.

If we look at the institution's EDI Action Plans, we can see that some institutions follow some of the steps, and that only a few institutions state that they follow all of the steps. Among other things, we see that many of the action plans refer to mapping, status and reports related to gender equality, diversity and inclusion at the institution. However, there is a distinction between mapping carried out *before* and *after* the work on EDI measures (see figure 3.4).

The document analysis indicates that most institutions emphasise investigation, mapping, and/or reporting *prior to* implementing EDI measures. For instance, several refer to statistics on gender balance at their institutions and then indicate the goals and measures to create a better balance between men and women. The fact that many include such status mapping and reporting in their action plan may be related to the employer's duty to work for and report on equality and anti-discrimination (see section 1.2). This duty entails that the institutions "shall issue a statement on the actual status of gender equality in the undertaking and what the undertaking is doing to comply with the activity duty" (Section 26a, Equality and Anti-Discrimination Act).

Although several institutions develop their EDI measures based on prior investigations and mappings, only a few mention how they will follow up and/or evaluate the EDI measures. It is important to emphasise that descriptions in an action plan do not necessarily indicate what the institutions are doing in *practice*. It is therefore possible that some institutions have a well-developed, comprehensive intervention plan for the measures that is not reflected in their EDI Action Plans.

The challenge of documentable goals and measures

Some of the action plans also indicate certain contrasts and challenges related to EDI work at the institution. The challenges concern whether action plans should be based on documentable goals and measures. This refers to EDI measures and other EDI work that can be easily documented, quantified, or measured, and to

what is more difficult to document or quantify. For example, it is relatively easy to document how many people have *attended* a course on ethnic diversity, but more challenging to determine how many people *changed their attitudes* due to their participation.

On the one hand, advantages of EDI Action Plans based on documentable practice are emphasised, as these are easier to measure, follow up on, and evaluate. This is addressed in the following action plan statement:

The committee that revised the 2017-2021 Action Plan held several meetings in 2021 to work on its revision. Among other things, the committee has invited the KIF Committee (Committee for Gender Balance and Diversity in Research) and organised several rounds of discussions and reflections on concepts and objectives. The committee has assumed that the action plan must be based on documentable practice, so that sub-goals can be documented afterwards to evaluate the efforts (EDI Action Plan from a university).

Despite the statement above, this action plan does not specify how the work is planned to be followed up, documented, and evaluated.

On the other hand, it is noted that not everything can be quantified, measured or documented. Consequently, it can be difficult to evaluate and quantify the effect of certain measures. This is expressed in the following quote from another action plan:

Different influencing factors, and therefore different measures, impact the various areas. It is also important to realise that the effects of the measures can only be quantified in the area of gender equality. The action plan itself does not include statistics or overviews, but it does state that gender-balance statistics must be prepared and made available by HR every November (EDI Action Plan from a university college).

Although only a few of the action plans explicitly mention challenges and tensions concerning quantifying, documenting, and measuring certain types of EDI work, such statements are worth highlighting, as they may indicate a broader challenge in the institution's practical efforts. This is supported by findings from the qualitative interviews, in which several interviewees commented on similar challenges (see Chapter 5).

Overall, the document review indicates certain challenges in designing EDI measures for the action plans. Some of the challenges are related to how the measures are designed, such as whether they are specific or general, which groups they are aimed at, and whether they are based on easily documented practices. In addition, the challenges can be linked to whether, and to what extent, the institutions have stated how the measures will be followed up and evaluated.

Further questions that can be raised are whether these challenges are being addressed and discussed in the sector. What experiences have EDI actors had while implementing the action plans? What strengths and weaknesses do they see in their own action plans, and do they feel that the measures are specific and clear enough to generate action across the organisation? In the interviews and email survey, EDI actors discussed several of these topics, described in Chapters 4 and 5, where we present their perspectives on the implementation, follow-up and evaluation of the action plans.

3.4 Summary of document analysis findings

In this chapter, we have presented the following findings:

- Almost all of the institutions refer to EDI measures in their action plans.
- Smaller institutions often have a narrower focus area for their EDI work than larger institutions. For example, several of the smaller institutions focus solely on gender balance, whereas the larger institutions tend to adopt a broader scope in their EDI efforts.
- However, only a few of the institutions mention how they will follow up on the EDI measures.
- Often, this is achieved by referring to *who* is responsible for implementing and following up the measures, without detailing *how* the follow-up should be conducted.
- Even fewer action plans describe how the measures should be evaluated.
- Certain challenges are mentioned regarding whether the action plans should be based on documentable practices. On the one hand, it is presented as positive that documentable practices are easier to measure, follow up and evaluate. On the other hand, it is highlighted that not everything can be quantified, measured or documented. Consequently, it can be difficult to evaluate and quantify the effect of certain measures.

4 Experiences with the implementation of action plans

In this chapter and in Chapter 5, we present findings from the interviews and email survey. The topic of this chapter is the experiences of EDI actors with the implementation of action plans. In the following chapter, we present the findings on the follow-up and evaluation of EDI measures.

4.1 Dynamic work

In general, many EDI actors seem to have found the action plans to be a useful tool for navigating their EDI work. However, the findings show that the action plan is not always a static tool that is applied to the entire planning period but that it is sometimes adjusted at an earlier stage as institutions gain more experience and knowledge of which measures are appropriate and relevant. Several interviewees and respondents stated that they found it necessary to revise the action plan and measures as they gained more experience, and some noted that it is important to maintain some flexibility in implementing the measures. Some reported that they carried out an annual review of the action plans, as in this statement:

“I think it's important to be self-critical in the work we do [...]. We can [...] see what we can do better from year to year, because an action plan [...] must be a dynamic document, and a living document that we can change and adjust along the way. Because we learn as we go.” (university college interviewee)

Others shared a need to revise the action plan when the plan period ends, because the plan is relatively new, and expressed that they wanted to make some adjustments after their initial experiences. As mentioned in Chapter 1, the number of action plans at Norwegian research institutions has increased in recent years (Kifinfo, 30 January 2023). In our sample, the plans are also more recent at some institutions, indicating that work on measures aligned with the action plan is at an early stage. Several interviewee statements illustrate the recency of the EDI Action Plans in many institutions, and that there may be a particular need for adjustments after the initial learning period. One interviewee explained:

“We started with the ARP [the duty to work for and report on equality and anti-discrimination] in 2021, and then we had the Gender Equality Plan from [...] 2022. [...] so now it's time to update this [plan] and take a closer look at it. Because this

[...] arrived like a little storm over [us], right? With this report [ARP], and there was a lot [...] you had to familiarise yourself with to get that review. Then there was the Gender Equality Plan from the EU, which was a prerequisite for also getting funding for research [...] waiting for us.

So I think most people – and I've also checked with other [research] institutes – have the [action] plan from that point in time [2022]. And in a way, not much more has been done with it. [...] So now we've landed a bit, and [...] we're looking at how the ARP works, and we've got a bit of a handle on it. And now it's like, okay, we can work on this a bit more. [...] So I think that now we have time to actually sit down, evaluate it, and then redo it.” (research institute interviewee).

The interviewee explained that the organisation chose to “start at a low bar” when developing the action plan measures. They emphasised initiating a process, for instance, by inserting a sentence or wording that addressed EDI considerations in a job advert. Although they now would like a more comprehensive review, they, like some other organisations, have conducted an annual review of the plan. The interviewee explained that they have gradually built on the foundation and annually reviewed new elements of their work. Here, adjustments were made based on proficiency. By starting with simple tasks and seeing that they could achieve low-scale measures, the institution gradually scaled up its measures and deems the time right to take a more in-depth look at the plan itself. Conversely, other institutions have experienced that the measures are not entirely feasible and therefore wish to make adjustments. An EDI actor in an institution with a more recent action plan stated that they will be adjusting the plan because they had “a lot of measures”, adding that they have tried to “reduce the plan a bit” when revising it.

Generally speaking, it is often necessary to adjust measures and revise an EDI Action Plan based on experience, because the effects of the measures may be unforeseen and non-linear, and the context can change along the way (Kalpazidou Schmidt & Pedersen, 2025). At the same time, the data suggests that there may be a particular need for adjustments in the early stages of EDI Action Plan work. Some interviewees expressed that an external evaluation, at least in this early phase, could shift the focus away from improving the work based on their experiences, which we will return to in Section 5.6.

4.2 From gender balance to EDI

As mentioned in Chapter 1, Norway and other European countries have a longer tradition of working with measures to promote gender balance than to enhance diversity in academia (Musubika & Lotherington, 2025). The document review in Chapter 3 highlights that there is currently a strong focus on gender, both in the dimensions emphasised and the groups targeted by the measures. Gender is

emphasised most frequently. Ethnicity and disability are often mentioned, but specific measures are not as frequently implemented as they are for gender balance. This may reflect the fact that several types of diversity measures are relatively recent in many institutions. However, as discussed in Chapter 3, it is often easier to document the representation of women and men in various job and salary categories than to assess representation based on ethnicity, disability, or sexual orientation.

The interviews show that working with diversity in this sense is a new area for many institutions. The measures may be in a testing phase because they are new, as indicated in the following statement:

“[Gender balance] is something we are always looking at. [...] we try to focus more on diversity [as well]. Because it got a bit lost in the [...] action plan we currently have, which we will be revising. We also look at the job posting texts [...] it says [that we want diversity among employees] in the text, but what happens in practice? That's the most important thing, really. So we need to work on that.” (university college interviewee)

In this quote, the interviewee expresses a need to work more systematically on diversity. While this and other statements indicate that certain institutions and EDI actors have less experience with the diversity measures outlined in the action plan, both the interviews and document review show that there are other challenges associated with documenting the representation of various diversity characteristics than documenting gender balance. The data suggests that this barrier can make it somewhat more challenging to operationalise the work and its direction, as seen in the following quote:

“We're very clear about gender targets, and when we move on to the part about diversity, it becomes very much a case of 'yes, diversity is important', and so on, right? And we don't manage to get much further from there.” (university interviewee)

Interviewees with varying levels of experience in the EDI field at the institution, and interviewees from institutions that have had EDI Action Plans for longer or shorter periods, mentioned challenges in documenting the representation of diversity dimensions beyond gender. They described the challenge of insufficient statistical data to understand the status of these groups and to establish a baseline before implementing interventions. Moreover, some stated that asking employees and students about certain characteristics, such as sexual orientation, may be viewed as inappropriate, intrusive, unethical, and, in some cases, is illegal. Concerning disability, some interviewees noted that certain quantifiable indicators exist, such as the number of hearing loops installed. However, they emphasised that

such overviews provide only partial insights into functional variations, which may limit the opportunity to quantify the need for and the impact of various measures.

Some interviewees found the transition from focusing on gender balance to the broader EDI approach to be challenging. They have experienced that actors within the institution who have invested significant effort to achieve gender balance may be concerned that this focus is being overlooked. There are concerns about competition for resources as the scope of work on such measures is expanded. One interviewee stated:

“[in my institution], there are [...] academic leaders who were once the only young woman in their field and have fought tooth and nail for years to create greater gender balance. Then youngsters like me come along and say that we need to talk more about diversity.”

Another interviewee at a large higher education institution stated that she has not encountered any negative resistance to diversity efforts within the organisation, but that there is a desire to maintain and advance the work to ensure gender balance. There is a reluctance to allocate funds from this source, and in this case, funding for the field must be increased if diversity measures are to be financed through other means. The interviewee stated that this would be a challenging prioritisation. Both interviewees believe that some types of measures in the action plan need to be adjusted because they may be disproportionate to the broader goals of the action plan, which mention a number of target groups.

Interviewees also emphasised challenges with implementing a broad concept of diversity. In the document review, we found that a broad concept of diversity is used across many action plans from universities, university colleges and research institutes. As mentioned in Section 1.1, the broad concept of diversity in many plans often encompasses a range of underrepresented and marginalised categories, and universal life stages are sometimes included as well. In this way, no one is “forgotten”, but some of the findings indicate that this breadth – in terms of what the diversity and measures should encompass – could pose challenges for developing detailed measures for individual groups. In some instances, individual groups that are mentioned at the start of the action plan are not included in the plan’s measures, as some interviewees also noted. In comparison, measures to promote gender balance have often focused on subgroups of women or men (e.g., job categories). One university EDI actor said that selecting and prioritising specific sub-groups from the action plan’s broader diversity concept could prompt reactions within the institution. Another EDI actor stated that making such a choice could require extensive anchoring processes among management, affected groups and other employees.

4.3 Experiences with good implementation processes

In the email survey, many EDI actors commented that the implementation of measures varied. Their responses indicate that several factors affect the implementation of the measures. These include whether management or others must make a decision before a measure can be initiated (which is particularly relevant for broader measures), the institution's priorities, and the expected duration of a measure. Both respondents and interviewees stated that specific and operationalised goals have contributed to implementation. One interviewee suggested that the action plan's measures should strike a balance between being neither too general nor too detailed, to lower the threshold for getting started.

What do the findings tell us about EDI actors' views on what promotes *good* implementation processes? One topic that particularly stands out in the responses to the email survey is the need for a *clear division of responsibilities*. Examples of people and bodies that are delegated responsibilities include EDI committees, safety representatives, HR, working environment committees and managers. In this way, ownership and obligations for the EDI measures are distributed. Respondents also stated that good interactions among different actors tends to promote effective implementation. In addition, some respondents have found that local, specific measures have worked well when these are embedded into the organisation and when dedicated individuals accept clear responsibility for and ownership of the measure. While shared ownership is emphasised, the email survey findings indicate that it is also advantageous that those who developed the plan remain actively involved in its implementation. Relatedly, some interviewees shared that an unclear division of responsibilities made implementation challenging, as indicated in the statement below:

"It was [...] unclear who [...] was responsible for what [in the action plan]. And there was [so much] [ambiguity] that [we in] the [EDI] committee had to hop to it to fix and do things that really should have been [on the agenda] [...] and now we've been sitting here trying to correct it in the new plan."

Some interviewees stated they were left with a large portion of the implementation work due to a weak or unclear division of responsibilities. The findings show that this can make implementation challenging and may cause personal stress and weak anchoring, which we will return to in Section 4.5.

Some EDI actors share positive experiences of incorporating EDI measures into other work in the organisation. An interviewee at a large higher education institution noted that, although this person would have preferred more resources for the overall work, it was advantageous to have EDI responsibilities integrated into part of this person's employment position. This has made it natural to discuss EDI measures in other contexts where this EDI actor is involved, such as personnel

policies. “It’s become natural to bring this topic with us wherever we go”, said the interviewee. Previously, the interviewee often had to remind others to send consultations to the EDI adviser, whereas “now, it happens more on its own”, it was stated. In other words, this type of position has promoted that EDI work becomes part of other activities in the organisation. However, the interviewee adds that the disadvantage of having this type of position is that EDI efforts must give way to other considerations when more urgent issues arise.

One EDI actor reported good experiences with routinely inviting both men and women to interviews. The interviewee explained that the institution found that women “write applications differently than men” and sometimes express their competencies in a better way in job interviews than in their written applications. The procedure has improved the organisation's hiring rate for women. One example of how EDI considerations are integrated into organisational practices is that an institution has established follow-up procedures for all employees who have been absent due to illness or leave (e.g., maternity leave) upon their return, referred to as “reboarding” procedures. This procedure has proved particularly beneficial for women, the interviewee said. These last two examples entail an assessment of whether the measures are successful (i.e., effects), which is not the subject of this project. They are mentioned here because these procedures exemplify how EDI efforts can be distributed among several people in an organisation, which, in our overall findings, appears to support good implementation.

Respondents also mentioned other factors when they comment on what can contribute to successful implementation. These additional factors are 1) sufficient resources; 2) that EDI work is systematic and targeted; 3) that EDI work is part of the strategic organisational agenda; 4) that the EDI measures are accessible to everyone in the organisation; 5) communication about EDI work across organisational units; 6) that EDI measures and personnel policies promote a positive and inclusive human view; 7) open communication about challenges related to language, culture and identity; 8) curiosity and dialogue; and 9) continuous follow-up, including follow-up by management. Apart from management oversight, these topics are not recurring findings from EDI actors. We will therefore not elaborate on the more isolated findings here. In Section 4.5, we address the significance of management oversight and anchoring¹¹, which is a topic that several respondents and interviewees commented on.

¹¹ The literal translation of the Norwegian term “forankring” is *anchoring*. Anchoring is commonly used in the Norwegian context to describe how measures are embedded into an organisation, including how they are incorporated into organisational procedures, rooted in practice, and supported by management and staff. Thus, when EDI actors in this study mention *anchoring/anchored*, a wider interpretation of the term may be applicable.

4.4 Partners and resources in EDI work

The key role of EDI actors

Many of the interviewees have played a key role in designing and implementing the action plans. Several have also been involved in evaluating the work, primarily by examining what has been done. Prior research indicates that diversity and equality advisers promote systematic and consistent EDI work (Egeland, 2023). Our interview findings support the importance of having one or more people who are closely involved in this work. Not all the EDI actors in our data hold the title of diversity or equality adviser, but many have EDI work as an important part of their position, such as within an HR role. The findings indicate that having one or more key people who coordinate and follow up on the EDI work, which commonly involves several units and people, promotes systematic, strategic, and long-term EDI efforts in organisations. Conversely, one university college interviewee stated that a significant challenge for the institution's EDI work has been the absence of a comprehensive strategy until recently. The interviewee explained that the EDI work has "been a bit in HR, and there haven't been dedicated resources for it, so there has [...] been no full focus on [EDI work]." The interviewee stated that the rector wants EDI efforts to "be a grassroots initiative", and that "we should develop focus areas and specific measures from the ground up through our employees", despite the organisation not having dedicated staff members who specialise in equality and diversity.

Collaborative partners

The interviewees described various resources and collaborative partners in their work with design, implementation, and evaluation of the action plan. *Internal partners* they mentioned include working environment committee meetings (helping to "keep up the pressure in this work", according to an interviewee), and that safety representatives/employee representatives can contribute to the visibility of EDI efforts related to recruitment. At some institutions, these employee groups are also members of the EDI committee, which is considered useful. In many institutions, management serves as an important collaborative partner, whereas others lack a more closely aligned management team, as discussed in more detail in Section 4.5.

Some interviewees have found that having a BALANSE action project at their institution may strengthen their other EDI work. They have found that this has enhanced the institution's EDI expertise through the researchers involved in the BALANSE project. Others have found that when a project overlaps with other EDI

efforts in the organisation, this has led to greater support from research administration for advocacy work.

In terms of *external partners*, several interviewees and respondents stated that the KIF Committee has been an important resource for EDI work. They shared that the KIF Committee has provided guidance on conceptualisation, action plan development, and the preparation of the annual report. They have also contributed to the exchange of experiences between institutions through the network conference and the LUN network¹². In addition, some interviewees said that co-operation and sharing experiences with other research institutions is helpful in their EDI efforts. For instance, some research institutes with similar academic subject areas have networks through which they shared their experiences in creating action plans during the initial stages of the work. One university interviewee described the benefits of exchanging knowledge with other research organisations initiated by the KIF Committee and called for greater collaboration. This interviewee highlighted the work of the LUN network in developing a diversity management course for academic institutions. The interviewee said that this network is as an example of how institutions can pool their resources, expertise and capacity to accomplish tasks that individual institutions would not be able to manage on their own. Moreover, the interviewee stated that internal surveys and mappings conducted at one university can also be useful for other universities. The interviewee encouraged taking additional steps to increase collaboration between institutions on shared issues, emphasising that the institutions do not compete in this area. In other words, the findings indicate that collaboration with other research institutions can be fruitful for sharing experiences and increasing resources and capacity in the field, thereby enabling them to achieve more.

Expertise, experience and organisational knowledge

EDI actors from both large and small institutions shared that one resource in the organisation's EDI work is the presence of research staff with academic specialisation in gender equality, diversity and inclusion. It is noted that these professionals can be invited to serve as speakers and conduct internal evaluations. In certain areas, researchers with expertise in EDI have contributed to developing measures and have contributed to grounding the efforts in academic research. At some institutions, professionals in the EDI field are also part of the EDI committee.

In addition, the findings indicate the importance of the EDI actors' expertise and experience in their work. For example, one interviewee stated:

¹² The LUN network is a network for equality advisers at Norwegian universities and university colleges, the KIF Secretariat and Kifinfo; see <https://kifinfo.no/nb/content/nettverk>

“When this work was to be anchored in our organisation, I was given responsibility for it at a very early stage, and I felt that I wasn’t familiar with the organisation [...] back then. So, growing into the role has helped me in this work. I think it’s [important] to be familiar with the structures in the organisation – everything from salary policies to life-phase policies [...], and this plays a part in recruitment processes.”

In addition to organisational knowledge, EDI actors highlighted their own educational backgrounds and skills development (e.g., through courses) as important resources for EDI work. The findings suggest that such expertise can enhance EDI actors’ abilities to conceptualise and make priorities in this field. In addition, academic expertise can provide legitimacy and enable academic argumentation in organisations where knowledge development is the core activity. For instance, some have found that when presenting the results of an internal survey, they are asked questions about the methodology.

The need for networks, resources and collaborative partners

Several respondents in the email survey called for greater resources for EDI efforts. Many of them mentioned that HR is limited in what it can achieve due to a lack of time and resources. In the interviews, a lack of resources was less frequently addressed when we asked open-ended questions about the challenges and resources in the work. However, a few interviewees mentioned this topic. For example, one interviewee at a research institute stated that it was important to have sufficient time and resources, especially when implementing new measures:

“I think [...] [it’s important to have enough] resources to enable time and attention, and to introduce measures. Trying something new isn’t always easy. It’s easier to implement what is already in place. But [introducing] new things, I think it is important. And we have also seen that you have to have a certain role in the workplace [or] on the team, where you [have] enough [...] influence to implement new things.”

In another interview, with interviewees in the higher education sector, one interviewee expressed that there may be too few resources for this work, as well as “too few links” between people working in the EDI field at the institution. This was supported by another interviewee in the same interview. At the latter interviewee’s university, responsibility for EDI work is divided between different people. The interviewee considered this an advantage in some ways because “we bring different perspectives” to the work. However, the interviewee also felt that resource distribution could limit opportunities for competency development. The interviewee also thought that the field needed to be strengthened by additional

employee resources. Although other interviewees did not explicitly express a need for additional resources in their work, the interviews – especially those with employees at universities and certain university colleges – show that EDI actors have an extensive range of responsibilities. They must navigate complex organisations, gather information, and report on various issues within these environments.

4.5 Anchoring and engagement within the organisation

Outside the EDI field, it has been noted that strategic plans can serve as a tool to ensure legitimacy (Stensaker et al., 2019). Similarly, EDI Action Plans can convey information about institutions' efforts for equality, diversity and inclusion. However, anchoring also involves the role of EDI work in the organisation's regular operations, i.e. not just what someone says they are going to do but also how structures support EDI efforts (Baltaru, 2022), and whether leadership and staff actually get involved.

Many respondents specified that procedures and support from leadership are important for implementing EDI measures. Some pointed out that measures incorporated into the institution's procedures over time have contributed to anchoring, and several had spent a long time establishing good co-operation with management.

There are significant differences among the interviewees regarding the extent to which they have experienced management involvement in preparing, implementing, following up, and evaluating the action plan. Some interviewees have experienced commitment and engagement from management. Others shared that they have felt – and sometimes still feel – somewhat alone with the EDI work in the organisation. An EDI actor from an organisation where EDI measures were embedded well shared that the entire management and HR team was involved in the EDI work. This included employees who are responsible for recruitment, personnel administration and legal matters: “So we're never alone”, said the interviewee, adding:

“So that's a strength, I think, that there are many [...]. Even if not everyone is responsible and has the [EDI] role every day, [it's] still a [strength] that everyone keeps [EDI] in mind and gives it some thought.”

There is a strong contrast between the proficiency and anchoring expressed by this interviewee and the experiences of those who report a low level of support and engagement from management. One EDI actor described a lack of commitment and engagement during both the design of the action plan and the implementation of the measures. When describing the preparation of the action plan, the interviewee used expressions such as “we nearly fainted” and “it was almost impossible

to pull off". The interviewee, along with another person, was responsible for the institution's action plan. They shared that they experienced "good processes with risk assessments" but added that things got "very quiet" when they asked for input to the action plan. In the action plan, they had stated responsible persons for the measures, but "there was no commitment" when they asked for input, according to one of the interviewees. They wanted the EDI work to be mentioned in the institution's strategy, and one of them expressed that the action plan was written in a way that allowed it to "blend seamlessly into overall strategy work". The work on the action plan had coincided with some conflicts on other issues in the organisation in recent years, and one of the interviewees commented that "a lot has had to wait [...] [and the institution] may have had enough just managing daily operations". We are unable to determine the reasons or intentions behind the apparent lack of management involvement without interviewing other actors at the same institution. What we can say, is that from these EDI actors' perspectives, a low level of management involvement can make the work feel like an uphill battle. They described situations where they took on a strong advocacy role rather than collaborating with others in the organisation on EDI measures. For instance, they stated that they had "pushed for" a measure for people with disabilities without "getting much feedback on it." In such situations, implementing EDI measures may rely heavily on individuals, and the progress can be slow.

An interviewee from another organisation with a perceived low level of support said this led to "almost feeling burned out". This personal stress is linked to a perceived low level of engagement from management and the EDI committee, and to the fact that much of the work fell to a single HR worker who was responsible for both management training and the implementation of recruitment measures. The interviewee also experienced that management was more committed to gender equality than to diversity, which made it challenging to initiate diversity efforts. The situation has improved, likely due to a new EDI committee composition, changes to senior management, and an approach more characterised by shared responsibilities within the organisation. Moreover, the interviewee also experienced that EDI efforts were now more valued by management. The interviewee remarked: "In my experience, this field is now a little easier to navigate. We have a bit more enthusiasm out there [among management] and a bit more backing." The interviewee added that the attacks on DEI plans in the US "have actually made the rector more like: 'yes, well now we *do* have to work on this'". Although we did not interview management, the EDI actor's quote could indicate that resistance (in the form of limited engagement in the subject of diversity) has partly stemmed from the values of the EDI work being taken for granted and viewed as something that does not need to be addressed in Norway. When this is perceived to be at risk, the level of support has increased.

Several interviewees working at research institutes and university colleges have experienced engagement from management as superficial and transient. These interviewees felt that there was an upsurge in management involvement when the requirement for a GEP came from the Research Council of Norway and Horizon Europe 2020, but that this involvement diminished once the plans were in place. There are several possible reasons for this. It *may* indicate superficial engagement, but it could also reflect that managers are prioritising urgent work and spreading their efforts across multiple areas and requirements.

In one interview, participants shared that when they began working on the action plan, it was fruitful to point out to management that some GEP requirements were tasks the institution had already been doing, but that they had been renamed (for example, certain already existing tasks now became part of inclusion work). The interviewees stated that much of the work in the transition to GEP involved reassuring management and telling them that the work would not be that extensive, as shown in the following statement:

“We have many employees working with us who come from non-Western countries [...], and we’ve had work experience candidates from the Norwegian Labour and Welfare Administration for years. But this was never put into a system. It hasn’t been given this label [...]. So it becomes sort of huge and scary, and a bit like, ‘what do we do now?’. And when we placed [the efforts] at the lowest level, really a bit due to [the level of] readiness, it was like, ‘well, we already do a lot of this stuff’. So yes, we’ve also raised awareness and actually reassured management, especially in relation to recruitment and [...] universal design, and told them that what we’re already doing is a part of this and [that we have] just given it a [new] label.”

Like other EDI actors in the same interview, this interviewee stated that they deliberately chose to “set the bar a little low” when starting the EDI action plan work. Today, the work appears to be well embedded in the organisation.

Regarding other colleagues than management, our findings show considerable differences in EDI actors’ perceptions of engagement and support. Some respondents mentioned that they have spent a lot of time discussing EDI efforts with colleagues to foster a common perspective within the institution. This was also stated in one of the interviews. Here, an interviewee said that obtaining employees’ opinions and listening to their conversations formed the basis for the measures in the action plan, thereby making the measures recognisable to the employees. It is interesting to note that the interviewee said that in these conversations, there were vigorous discussions on challenging topics within the organisation, which in this case later led to agreement on measures.

Very few interviewees reported that they had experienced controversy about EDI work within the organisation or that management and other colleagues had voiced negative views about EDI efforts. One exception is that two interviewees experienced a disagreement within their institution about whether Pride should be celebrated. The reasons given for the disapproval was that it concerned political neutrality, and that other minority groups are not similarly celebrated. Another exception of experienced controversy concerned language. One interviewee reported that there had been a disagreement within the institution over whether to speak Norwegian to non-Scandinavian students who are not proficient in Norwegian. Participants in the other interviews did not address this theme of language use in their organisation, although some highlighted that a high proportion of employees have an international background. In the email survey, one respondent noted that resistance within the organisation could delay the implementation of measures, which left the measures on hold.

Instead of encountering explicit negativity towards the EDI field, some interviewees reported that they had experienced indifference, sporadic management involvement, that the field was given low priority, or that they expected it to be deprioritised should there be a need for financial downscaling. One EDI actor stated: “I rarely see people shouting 'no' and 'I don't want to' and so on. But they may not be jumping up and down with enthusiasm either.” The same interviewee described a lack of continuity in the work and commitment from other parts of the organisation. This interviewee described sporadic requests from others in the institution in which the interviewee from time to time is asked to give lectures on the EDI field without further specifications. Other participants in the same interview seemed to recognise this experience. The exchange between interviewees on this topic suggests that such sporadic requests sometimes reflect the need for a professional orientation of new management. However, it may also indicate weak internal anchoring and transfer of knowledge about the EDI work within management, so that the management's work in the field largely depends on contact with the EDI actor. Furthermore, one of the interviewees stated that, when working in leadership development and training, there were many relevant topics, and that it is important to be aware that “*everyone* struggles with not having enough time”.

Indifference and lack of prioritisation have been interpreted as forms of resistance regardless of intention (Sørensen & Amundsdotter, 2025), since the (lack of) response to EDI work will hinder a successful implementation of measures. Our findings show that there may be various reasons for indifference or low involvement, where negativity and an intention to impede EDI development are only some of several possible reasons. We saw in the previous example how engagement in an organisation increased at an institution once EDI values were considered to be at greater risk. Furthermore, the findings show that there may be

different perceptions and awareness of who the EDI field applies to. In one instance, an institution sent out a survey to its employees, and when the EDI actor asked a few colleagues whether they had responded, one colleague replied that they thought the survey was aimed at people from minority backgrounds. The interviewee stated that this comment had nothing to do with objections to the work itself, but rather about its perceived relevance to that individual. This example illustrates that not everyone shares the same concern for diversity and inclusion as EDI actors, which does not necessarily indicate negativity towards this field.

Some interviewee statements also suggest that the lack of prioritisation of EDI efforts may be due to competing tasks and mandates, and/or general fatigue with reporting requirements. When we asked the participants in one of the interviews if they had experienced resistance to EDI work at the institution, one of them answered:

“No, I haven't [experienced] anything [...] there may well be some resistance, but I haven't experienced it like that where I am now... [...], it is not as though they're against it. I think it's more [...] that [EDI work] competes with other important things. It's a bit like, 'fine, now we have to get started with gender equality and diversity work again'. [...] So it's competing [with other issues]. Of course, that's [...] probably the case with many other fields, as well.” (university interviewee)

The quote suggests that a lack of prioritisation and engagement may, in some cases, be a matter of interpretation. When analysing the findings, the interpretation may also depend on the theoretical approach to resistance.

The data further illustrates that management does not have “one head” but consists of different people with different levels of engagement with the EDI field and other topics. One interviewee, a manager, stated that the institution's head was strongly engaged in the EDI field, which led to anchoring within the management group. The interviewee said, “there [is] no discussion [among leaders] about whether we should spend time on it, but *how* we should spend time on it”. At the same time, the interviewee found that “prioritisation tends to vary a great deal, even in the management team, in terms of what we should spend time on [and] what we don't have time for when we must prioritise”. This experience was shared by other interviewees. Varying levels of management engagement can be even more complex in large organisations within the higher education sector.

Anchoring in large higher education organisations

At larger universities, some interviewees reported more systemic challenges in the progress of the EDI work. Some found that measures had to go through a cumbersome anchoring process. One interviewee stated: “[there are] often cumbersome processes here. [The work] has to be embedded in all directions, and the

responsibility becomes a bit diffused along the way”. The interviewee also described a measure that had to undergo a very detailed approval process at the highest level of the organisation, which made it time-consuming to get started. This was perceived as particularly unfortunate as the measure involved collaboration with external organisations. Another issue that was mentioned in the same interview is that in large organisations, information can be lost along the way when it is communicated to several persons through extensive email correspondence. However, an interviewee at a smaller university found it easy to drop in on the pro-rector when needed, whereas participants at larger universities expressed that this would not be accepted.

Interviewees also noted that universities are complex organisations because they have two lines of management – one academic and one administrative.¹³ One interviewee at a large university stated that the work should be more thoroughly anchored at different levels of the administrative management line, and also at lower academic levels in the organisation:

“I believe that [anchoring] could always be better. It’s a rig, and I’m in contact with the management, perhaps especially the rectorate [...]. We’ve realised [...] that it’s good that the rectorate has the responsibility, but that [the EDI work] should also be [better anchored] administratively, and also within the academic units. So, we must [...] make sure [that the work] is properly anchored in both management lines. After all, the rectorate is so academically [orientated]. They are responsible for research, dissemination, teaching, and perhaps also the [...] epistemic social mission [...]. The administrative line [has] a lot of [focus on] HR and operationalisation and that sort of thing.” (university interviewee)

Large universities and university colleges can have a particularly broad range of measures: some academic, others primarily administrative (e.g., discrimination, harassment, and accessibility), and others that lie at the intersection and involve both (e.g., recruitment). Hence, anchoring in both lines of management seems particularly important in large institutions. One EDI actor at a university said that certain types of measures concern how research is conducted, which is “difficult to implement by an administration”. The interviewee explained that in such cases, the role of the EDI actor(s) “becomes much more [...] [about] learning what is being done in different academic environments”. This and other university interviewees reported that they were in contact with many people through their position, but that they did not have much decision-making authority. They could also provide advice and contribute to competence development if requested. At the same time, some of these interviewees experienced they were alone with a lot of the EDI work.

¹³ Norwegian higher education institutions have a dual leadership: one administrative line and one academic line.

It is probably no coincidence that most of the interviewees who reported good collaboration with management were employed in small and medium-sized organisations. It can be more noticeable when management supports EDI work in such organisations, as there is often a shorter route to management and more opportunities to meet with management than in larger organisations. In larger organisations, a sense of isolation in the EDI work does not necessarily indicate a lack of management support. Instead, it could reflect the fact that these EDI actors function within complex organisations that face many competing considerations. In-depth studies of organisations from the perspectives of different types of actors could provide greater insight into such dynamics.

4.6 Practical challenges and dilemmas in implementation

The section above addresses some of the institutional and relational challenges related to collaboration, commitment and support within the organisation. In this section, we will present our findings on practical challenges and dilemmas related to different ideals and goals for implementation. First, we would like to emphasise that interviewees overall reported progress and proficiency in their EDI efforts, also at institutions where both minor and major implementation challenges were reported. Many of the topics we address in this section are *reflections* that some interviewees had about their work. As this report was commissioned to contribute to a knowledge base for developing an (external) evaluation and monitoring framework, we will emphasise the challenges and dilemmas highlighted by the interviewees, as many of their reflections and experiences are relevant to consider when developing evaluations.

Practical challenges

Several interviewees spoke of challenges related to *the recruitment base* for positions with poor gender balance. They discussed significant skewing among potential applicants, which may already be emerging among students in the discipline. In such cases, no obvious measures would yield short-term effects within the same institution. However, several EDI organisations mentioned steps they have taken to improve gender balance within their institutions or units when qualified applicants of both sexes are available. In this context, some interviewees also emphasised the importance of knowing which HR tools are available. For example, one institution with a low proportion of women chose to hire two people instead of one, both a woman and a man (when two highly qualified women were ranked as numbers 2 and 3 in the appointment recommendation). The interviewee remarked:

“And that’s the most effective thing you can do if you’re patient and have some foresight. [...] But [...] the managers must [...] be told that we’re allowed to do it, HR-wise. There are HR advisers who will claim that it’s not permitted, [...] but it is. So this is about raising awareness among those who are hiring so that one is aware of these opportunities.”

An interviewee from another higher education institution raised a similar issue. He mentioned that an institute that had previously employed only men decided to advertise three positions in research areas where they knew women were active. This choice resulted in an increase in the proportion of women at the institution in both the short and long term. The interviewee emphasised the importance of making positive experiences known and of having knowledge of legislation and the flexibility permitted in hiring processes.

The findings also indicate that institutions located in less central areas may face particular challenges in maintaining gender balance and diversity. One interviewee stated that because of their research institution’s geographic location, they would be lucky to get any applicants at all. In such cases, ensuring the representation of underrepresented groups in recruitment are a secondary concern.

Another practical problem that is raised in one of the interviews concerns wage differences between academia and other industries. Some research organisations find that it can be difficult to retain women at higher career stages in certain disciplines (e.g., ICT and engineering) due to higher salaries in the private sector. One interviewee shared the following:

“We’ve spent a lot of time and resources over the years on bringing women into professorships, and then they reach a point where they quit [...] because they’re in demand, [which is] great for the women, but it means we’re not able to get more [female professors]. The way we see it, the measures we implement apply to the entire sector, not just individual institutions. The best ones will always be able to get a better offer [which] we can’t match.” (research institute interviewee)

In other words, this interviewee argued that EDI work must be viewed as part of a joint societal effort, and that outcomes within the organisation must not be assessed separately from this.

Interviewees also described practical challenges related to disability that they did not see immediate solutions to. They mentioned obstacles to universal design and accessibility when institutions are located in older buildings. Furthermore, it was emphasised that certain positions, such as those in laboratory work, require a certain level of health and certain physical skills, which may limit hiring opportunities for individuals with functional challenges.

Dilemmas

EDI actors also reflected on several dilemmas and conflicting considerations they face in their work. *Security clearance* is one of the topics many of them mentioned, specifically how internationalisation and non-discrimination stand in contrast to the requirement for security clearance, which defines certain countries as high risk.

Furthermore, several interviewees commented on challenges in quantifying diversity and in representing diversity. Various aspects of this were discussed. In one interview, an interviewee described a dilemma between focusing on the well-being and inclusion of current employees versus working on representation of diversity in recruitment. The interviewee said:

“with regard to recruitment [...] the applicant pool is actually a [...] barrier, [...] unfortunately [the] market [...] is a bit challenging, and that's something we don't always have control over. [...] we are [...] concerned about life phase policies because they concern the employees we have today, and they are the ones who are important to us. Of course, the employees that we need both yesterday and in ten years' time are also important, but it's the [employees] we have now who are the most important to us. I can't make them more diverse, but I can work on their inclusion in relation to sick leave, in relation to life phase policies, and in relation to accessibility [if] something should happen to someone who is already employed. So it's a bit about your perspective as well.”

Another dilemma related to representation is that not everyone wants to be counted or placed in a target group to receive measures. Within research on law and education, it has been pointed out that both highlighting and not highlighting diversity can be perceived as stigmatising, depending on the person and situation. What in some contexts and for some individuals may be perceived as recognition, may in other contexts and for other individuals be perceived as the opposite (Norwich, 2014, cf. Bond and Pyle, 1998). As in all arenas where diversity is the key issue, this dilemma is seen in our data. One interviewee explained:

“We had a promotion course for female associate professors. I felt that it was very successful, but I always dreaded sending out invitations because there were always certain reactions, because it is a support programme for women, so to speak. So there was a bit of ‘no thanks, I can manage on my own’ feedback here and there. That they kind of found this patronising. But I know that those who participated [...] were very satisfied.”

Another interviewee at a university college has found it easy to gain support for equality in the institution, but when it comes to promoting equity, there has often been more resistance. Put simply, *equality* is often associated with fair, equal

outcomes, and occasionally with equal treatment, while *equity* is associated with special measures (Duarte et al., 2022; Bond & Pyle, 1998). Special measures are often based on the idea that they will promote more equitable outcomes by evening out groups' unequal starting points, where some are more privileged while others face disadvantages due to, e.g., historical oppression. The interviewee stated:

“I find that 'equality' is quite unproblematic. Equal rights, equal opportunities – we're all in favour of that. But as soon as you start introducing potential measures aimed at promoting equity – if we want more female professors [...] by e.g., offering more and earlier sabbaticals for female associate professors – well, [...] once you start hinting about such things, the very individuals these measures are intended to support tend to react. This is mostly because one doesn't want special treatment, since that sort of entails that 'we are a problem'. So this area is a bit touchy, I think, when we're discussing what might be good measures to address some very specific goals.”

Such tensions can be relevant in many contexts, but there may be a unique dynamic within academic culture due to the ideal of meritocracy, which holds that hiring should be based solely on individual performance, effort, and merit. In both of the above quotes, we see that such resistance may also come from the target group for the measures.

Our findings also highlight that HR policies may limit the point at which diversity representation among employees can be recorded. One HR employee explained:

“We rely heavily on the [job] applicant informing about being a minority or having a disability. And that's not always the case. I have a recruitment process now where we've spoken to someone we really thought was a top candidate, but who said in the interview, 'I can't work more than 30 per cent'. And this wasn't mentioned until we were well into the interview process. At that point, it becomes a bit more difficult to facilitate [...] The majority of those we interview now don't have Norwegian-sounding names [...] They haven't ticked the box that they're immigrants, or that they speak a minority language. And then, even if we hire them, we can't actually say that we've employed someone with an immigrant background.”

In the same interview, interviewees also noted that it is not always clear whether a person “belongs” to a minority category, and that self-identification can vary. They remarked that people may identify themselves as Norwegian if, for instance, they arrived in Norway as children, but that they can still formally be counted as

immigrants. One interviewee, who came to Norway as a child, exemplified this when commenting on the previous interviewee's statement:

"I'm familiar with what you're saying. I understand my fellow countrymen very well, or should I say, my former countrymen, because I'm a Norwegian citizen and have lived here in Norway for a long time. But I completely understand why they don't [disclose their background]. And that's because it's been challenging to get a job if you've done that. And we know that many people won't do it. Some people will also choose not to press the minority button because they think they'll get special treatment. They don't want that. So, there are a few reasons for that."

Summing up, these statements indicate that applicants may not want to disclose their minority background out of fear of both positive and negative discrimination, and because they do not necessarily identify as minorities. We also see that HR rules for registering diversity do not always make it possible to document representation.

Some interviewees mentioned challenges related to *language and communication* in EDI efforts. Several expressed that it can be challenging to communicate the concepts of diversity and inclusion inside the organisation. Some have found that such terms create distance, as they can sometimes be perceived as exclusionary toward individuals who are outside the target groups for measures. One interviewee stated that it is difficult to explain the measures to employees "without stumbling into the wrong words here and there". Another interviewee who participated in the same interview agreed, stating that it is important to "find the right language". This interviewee's organisation has worked to clarify the meaning of the concepts of gender equality and diversity in its internal communication. These terms, according to the interviewee, "are a bit large and vague now". The interviewee added that the goal is "to be able to bring [the communication] down to a level and a language that everyone understands", and that the terms are not a source of antagonism. Furthermore, the interviewee emphasised the importance of working on the organisation's culture and of building bridges across generations. The interviewee herself had been told that the work should "happen organically" by individuals who were not minorities – specifically by "older white professors [...] who are a bit like: 'oh, is this what you're going to do now?'". The interviewee added: "It's not that they [...] are against giving people opportunities, but it's the language [that is the challenge], and it's difficult to agree on that point." The interviewee thought it was better to use words other than equality and diversity, which might create distance, and instead emphasise in communication that "these are measures to improve the staff's wellbeing". The interviewee remarked that language barriers could negatively affect employee cohesion. Furthermore, a common language has a practical dimension, for example, in the context of the annual

evaluation, where reports must be submitted by different parts of the organisation, such as the working environment committee and HR. The interviewee commented:

“It's much easier [...] to talk about these measures when one uses the same language as people use in the organisation. Then it helps quite a lot to get people to participate, so we use their language to describe things.”

In other words, the interviewee found that using existing terms in the workplace could foster support of EDI work, promote a shared understanding within the organisation and make reporting more accessible to employees. Another EDI actor from a different organisation had experienced that it was fruitful that EDI measures took life stages and dynamics between different generations into account. However, like much else in EDI efforts, positive experiences with focusing on life stages should not be viewed out of context and as a recipe for success in every organisation. In another interview, an interviewee expressed a concern that placing a too strong emphasis on life phase within the diversity concept could disadvantage minority groups. The interviewee said that with such an emphasis, differential treatment based on minority background could “disappear a bit, if you *don't* clearly put it into words”, and added: “Being a minority [entails] a bit more than regular working environment [issues], I'd like to think.” These contrasts in the findings illustrate the many aims that EDI efforts must navigate and balance, and that EDI measures and implementation cannot follow a set formula. It is crucial that measures are adapted to the context (Vilhena et al., 2025; Kalpazidou Schmidt & Pedersen, 2025).

4.7 Summary – implementation of measures

In this chapter, we have presented the following findings:

- Action plans are often dynamic documents that are revised before the end of the planning period.
- In some institutions, the work on diversity measures is relatively new, and some are in an early learning phase.
- Some interviewees highlight that documenting diversity representation could be more challenging than documenting gender balance. The findings also indicate that a broad understanding of diversity could pose challenges in practical EDI work.
- From the perspective of EDI actors, a clear allocation of responsibility, anchoring, and a shared ownership of measures appear to promote good implementation processes.

- The degree of perceived management involvement and anchoring varies considerably among EDI actors.
- Few interviewees reported that colleagues voiced negative views on EDI efforts. However, some shared that they had experienced indifference, a lack of prioritisation, or sporadic involvement from management.
- In large higher education organisations, anchoring appears more complicated, as the work must be anchored across administrative and academic lines at different levels. Implementation may thus be perceived as more cumbersome. EDI actors in such organisations have an important role as both coordinators and information hubs.
- Certain practical challenges are difficult to solve in the short term. One example is recruiting for gender balance from a skewed pool of potential applicants. Another example is the challenge of implementing universal design and accessibility in older buildings.
- Interviewees reflected on several dilemmas in EDI work. These dilemmas relate to security clearances, the representation of diversity, and the terminology and communication of EDI work within the organisation.

5 Follow-up and evaluation

In this chapter, we present findings on how EDI actors follow up and evaluate the EDI action plan efforts within their organisations. The term “follow-up” refers to procedures and activities aimed at monitoring measures after their implementation. The term “evaluation” refers to procedures and activities aimed at assessing how the work on EDI measures from the action plans is progressing.

Follow-up and evaluation may intersect in various ways. For instance, progress can be evaluated during follow-up activities, such as regular meetings or ongoing documentation, or a mid-term evaluation can be used to follow up EDI efforts during the action plan period. Furthermore, all documentation and meetings can serve as a basis for evaluation at the end of the period for an action plan or a measure.

Both follow-up and evaluation of EDI measures can be understood within the broader context of overarching organisational processes, such as the duty to work for and annually report on equality and anti-discrimination (“Aktivitets- og redegjørelsesplikten”). This report is included in the public annual report, as referenced in Section 1.2. For example, statistics on target groups by various grounds of discrimination at the organisation, both before and after measures are implemented, may be relevant for follow-up and evaluation. Additionally, the Work Environment Survey (Arbeidsmiljøundersøkelsen, ARK)¹⁴ can provide insights into employees' experiences within an organisation. Moreover, targeted surveys of employees who have participated in EDI measures can provide information about potential benefits of the measures or highlight a need for adjustments.

There are many nuances related to the follow-up and evaluation of EDI measures. In what follows, we present the findings in segments to clarify the key findings from the study.

5.1 Procedures for documentation and follow-up

The document analysis showed that several institutions base their EDI measures on previous mappings and assessments, but that only a few specify how they will follow up on and/or evaluate these measures. In the email survey, respondents were asked about their experiences with following up EDI measures. Nine of the

¹⁴ The ARK survey is sent out to employees in the Norwegian university sector every third year. The survey serves as an important tool for promoting a good work environment, and it is expected that employees respond and contribute to the follow-up. Organisations with more than thirty employees are required by Norwegian law to have a working environment committee (“Arbeidsmiljøutvalg”, AMU). In Norwegian academia, AMU typically follows up on the ARK survey results.

43 respondents reported that they did not have any procedures for following up EDI measures. Among the nine respondents who did not have follow-up procedures, five were from research institutes, three from universities, and one from a university college. It is worth noting that three of the five university respondents in our sample reported that they do not have any procedures for following up EDI measures. It is possible that respondents from larger institutions perceived the question of follow-up procedures differently from those from smaller institutions.

Among the eight respondents who said that they do not have procedures for following up measures, some reported plans to establish them. One respondent stated: “The Gender Equality Committee will establish these procedures in 2025” (government actor with R&D activities). Another respondent stated: “No, but we have plans for this through the Risk and Vulnerability Assessment” (university). Furthermore, some stated that they had no follow-up procedures “apart from the annual report” (research institute), or “No established procedures. The procedures include reporting to the board, management and via the duty to work for and report on equality and anti-discrimination [ARP]” (university college). However, definitions of follow-up procedures appear to differ among respondents, as some considered annual reporting and the duty to work for and report on equality and anti-discrimination to be follow-up procedures.

The majority of respondents (34 out of 43) stated that they have procedures for following up EDI measures. Many stated that follow-up procedures include the annual report and briefing the board/management. For many, a key part of the reporting work is the duty to work for and report on equality and anti-discrimination (ARP), which is included in the public annual report. For example, some university respondents answered: “Annual mapping of actions both locally and centrally, regarding measures and goals, is reported to the board” (university), and that the EDI Action Plan is monitored “through management’s dialogue with the director of human resources” (university). Examples of answers from research institute include the following: “We review the equality and diversity plan on an annual basis,” and “We compile a list of all issues that arise and include this as a standing item on the agenda for the last annual meeting of the joint committee that addresses these matters.”

Some respondents specified that more work will be carried out to establish follow-up procedures, or that there are aspects of the follow-up that they want to see improved. In response to the question of whether they had follow-up routines, a couple of respondents from university colleges stated: “Yes, in the sense of annual reporting, but not as well in day-to-day operations” (university college), and that “A new model/procedure must be established for the duty to work for and report on equality and anti-discrimination (university college). In comparison, a respondent from a research institute stated: “There are few people at our research

institute, so it's easy to maintain an overview. Reporting is included in the annual report to the board" (research institute). Another respondent, from a university, provided a very detailed answer to the question of whether the institution follows up EDI measures:

"We prepare an annual status report for the action plan. The status report is formally part of the Annual Report. The status report is included in a separate document and presented to the Board as the first item after the Annual Report is reviewed. The status report aims to meet legal reporting requirements for the action plan and to document how the action plan measures have been followed up. Information/data is gathered from various administrative units to show how the measures are being followed up, as well as their current status. A digital form has been prepared for collecting information from the institutes. To ensure comprehensive processing and presentation, the institutes receive a complete overview of reporting from all institutes, with the opportunity to make corrections, before the case is finalised. The status report is made available on a separate external website for gender equality." (university respondent)

Several respondents noted that, in addition to annual reporting, the EDI committee reviews measures in regular meetings, and that the committee also interact with other bodies, particularly the working environment committee, the co-operative committee for trade unions, and management. Answers from respondents from various research institutes included: "We have a working group that develops the action plan and holds regular meetings," and "The measures outlined in the action plan are incorporated into the institution's HSE-Q plan. Measures in this plan are discussed at working environment committee meetings about every six weeks and are reported in the institution's Annual Plan". Several respondents answered the question about follow-up in more detail, such as the following two EDI actors from research institutes:

"Yes, we establish an Action Plan for the duty to work for and report on equality and anti-discrimination [ARP] every year, which we work on regularly during the year and evaluate each year in November/December. We share these evaluations with the trade union and the working environment committee to ensure that the work is transparent and traceable. In addition, we have committed to two inclusion training sessions each year, and we report to the board on our working environment and inclusion work." (research institute respondent)

"A diversity group has been established to follow up on this work during the action plan period. The objectives, what has been achieved, and further measures are updated directly in the report about the work that is being done to promote equality and counteract discrimination. This report is published both externally and

internally. It is updated annually to include what has been achieved in the [EDI] work. We also report on the work of the working environment committee and the personnel council (a co-operative body that includes management/administration and trade unions)." (research institute respondent)

As an extension of their day-to-day work, a couple of respondents mentioned that employee appraisals (i.e. one-to-one work dialogue between employee and manager) and the Work Environment Survey (Arbeidsmiljøundersøkelsen, ARK) were important procedures for following up EDI measures, and for contextualising and assessing the need for measures. However, a couple of respondents mentioned that their annual procedures as such needed some adjustments. One respondent from a research institute stated, "We create new action plans every other year. The measures are devised through dialogue with safety representatives, employee representatives and the management team, based on key issues and feedback. The Work Environment Survey will therefore be important for assessing future measures" (research institute). Another respondent from a research institute stated that they map "certain issues related to equality and anti-discrimination in the employee survey (every other year)" (research institute). Some also mentioned that EDI work is discussed throughout the organisation:

"The structure for following up the plan works well. Our organisation draws up an annual action plan. This is an important tool for implementing the measures from the action plan for gender equality and diversity. This annual action plan is discussed with all employees. It is determined by the management team and communicated to the board. In this way, the measures are planned, operationalised and anchored. The board is regularly informed about the follow-up of the measures in the annual action plan, and about the follow-up of equality and diversity measures." (research institute respondent)

Only one respondent stated that they directly contacted those responsible for implementing EDI measures as part of their follow-up:

"Yes. We follow up measures every six months by contacting those who are responsible for the specific activities. We document the progress for each measure in an .xls file, and report to management and the working environment committee once a year." (research institute respondent)

Respondents' descriptions of their follow-up procedures contrast somewhat with our findings from the document review (which encompasses a higher number of institutions). The document review shows that only a few institutions mentioned how they would follow up the measures outlined in the EDI Action Plans (see Figure 3.1 in Section 3.2). Although we find recurring descriptions of follow-up

procedures in the email survey, there is some variation in how measures are followed up and how respondents described and interpreted the follow-up.

In the interviews, several EDI actors also talked about how the Work Environment Survey (Arbeidsmiljøundersøkelsen, ARK) and the duty to work for and report on equality and anti-discrimination (ARP) have been useful components of the EDI work, and stated that all or parts of the action plan can be evaluated using the annual compulsory report on the equality and anti-discrimination. Several interviewees indicated that such reports provide valuable information on the current status and can serve as a basis for discussing future efforts, as illustrated in the example below:

“Salary levels and salary mapping are crucial for highlighting issues in broader society and within our organisation. They reveal the problem of imbalances in senior positions. So, you present the salary mapping and get to talk about it, and everyone is involved.” (university interviewee)

In this quote, the interviewee points out that the mapping underpins the goals and aims of the measures. Moreover, the interviewee highlights that the issues associated with EDI work mean that everything comes “into play” once the mapping results are presented and discussed with colleagues. Another interviewee mentioned that the compulsory annual report on equality and anti-discrimination (ARP) are components of organisational reporting that can help systematise EDI work. However, the interviewee also addressed what the day-to-day work involves and how reporting in relation to the action plan can be strengthened. This interviewee acknowledged that follow-up and evaluation tasks may overlap. The boundaries between various tasks in the EDI work may also cause some confusion. The same interviewee expressed both a need and some uncertainty about how the organisation should proceed in following up on the measures in the action plan:

“We may need to look at how [...] these management forums, [...] [such as] the coordination group [...] can contribute to a closer follow-up of measures. [...] It's also something I've been a bit puzzled about – how we should [...] report and systematise the follow-up of the action plan. That it will likely be key to how the coordination group will look in the future.” (university interviewee)

This quote illustrates that the annual report on equality and antidiscrimination work (ARP) are integral parts of the organisational reporting. The interviewee is interested in what the day-to-day work actually entails and how to strengthen reporting in line with the action plan. As several respondents and interviewees (see 4.1) mentioned, adjustments to the measures may be necessary along the way. Consequently, follow-up routines may be an important part of EDI efforts.

5.2 Evaluation of EDI measures in the institutions

As shown in the document analysis, few organisations state how the measures will be evaluated in their action plans. This is consistent with the findings from the email survey, where respondents were asked about their experiences with evaluating EDI measures. 16 of the 43 respondents in the email survey reported that their institution had no procedures in place for following up EDI measures. Among these 16, nine are from research institutes, two (out of two) are from government actors with R&D activities, one is from a university, and four are from university colleges. Almost all university respondents reported that they have evaluation procedures, which suggests that these procedures may be more established than procedures for following up on measures (see 5.1). Among respondents from research institutes, we find the opposite trend. Only four respondents from research institutes stated that did not have any follow-up procedures, while nine said they had no procedures for evaluating the measures. Among respondents from university colleges, one person replied “no” to the question about follow-up procedures, and four said they had no procedures for evaluating EDI measures. Some respondents who answered that they had no evaluation procedures stated that they planned to establish them.

The number of respondents in the email survey is low, and comparisons across respondent groups should be made with caution. It is worth noting, however, that the responses suggest that evaluation procedures may be more established at universities, while follow-up procedures may be more established at research institutes and university colleges.

As in the answers about following up EDI measures, several respondents said that evaluations are part of the annual reporting or an annual review with management. In most cases, this entails an assessment of whether the measures have been implemented, and not an assessment of the measures’ effect. Some emphasised that they evaluate efforts that can be measured (see also Sections 5.4 and 3.2). Some respondents described conversations about non-conformance reporting as part of the annual review process and a method of evaluation. Furthermore, some answered that they evaluate by reviewing whether the measures are implemented by the end of the year, but not whether the measures had an effect. However, one respondent at a research institute said that at the end of each year, they primarily review whether measures outlined in the action plan have been carried out, or determine when they will be implemented, but stated that “in practice, this also [becomes] an evaluation of measures. The respondent added that they “have examples of measures that proved less suitable, and that should be revised before they are implemented”.

In addition to describing annual reporting and reviews as arenas for evaluation, several respondents reported that they have sent questionnaires or used other

methods of evaluating EDI measures within the target group. The Working Environment Survey was also mentioned as a possible approach for evaluating EDI measures. This was mainly answered by respondents from research institutes. Some also used an employee survey in this work. One respondent at a research institute wrote: “We conduct an employee survey every two years, which provides us with information about where we stand in relation to the impact targets for our work on diversity and inclusion.” The respondent added that they regularly evaluate their EDI measures to determine whether they “are perceived as useful and what changes we can make next time”. In other words, several institutions evaluate how measures are perceived by their target groups or employees in general.

Several respondents, particularly from university colleges, reported that their institution evaluated previous EDI measures when they revised the existing action plan or prepared a new one. For example, one respondent stated that a report they prepared themselves “was actively used to develop a new diversity plan” (university college). Others stated that a dialogue with managers and contact with employees in the target groups forms the basis for the evaluation.

During the interviews, we also found that the scope of the evaluations varies. Several interviewees spoke about evaluations conducted in connection with the compulsory annual review of the institution’s equality and anti-discrimination work [ARP], noting that this evaluation often involved work on the EDI Action Plan. Some evaluate and adjust the action plan concurrently with the annual report on equality and anti-discrimination work, while others intend to evaluate the action plan after the entire duration to which the plan applies. Several interviewees emphasised that the evaluations can be beneficial for gaining an overview of the work’s status and for advancing progress in the work. In addition, some interviewees in larger institutions expressed that they wanted evaluations to assess whether (larger) measures are working as intended and thus have a better basis for assessing whether the use of resources is appropriate relative to other possible EDI measures and needs.

5.3 Suggestions for follow-up and evaluation of EDI measures

In the interviews, we did not systematically ask all interviewees for suggestions on the follow-up and evaluation of EDI measures, but some interviewees commented on this issue. An interviewee at a large university emphasised the importance of identifying the manager responsible for each measure. Moreover, she suggested that it could be beneficial for the EDI adviser to hold a status meeting with those responsible during the year and to conduct “a consultation meeting” with relevant parties as the measures are nearing an end, “to hear how things

went, like an [...] oral evaluation". She also advocated for "using the reporting options to systematise [the work] a bit more". In addition, the interviewee proposed a collaboration between the leader responsible for implementing measures and the academic who has the dedicated responsibility for the reporting process, either by discussing it beforehand or by making a joint presentation. One interviewee at a university stated that it would be very useful if Kifinfo.no could provide templates for evaluation forms. Another interviewee, at a university, suggested that one useful tool for the evaluation would be a table that compares the action plans of the various universities to see how they address different grounds of discrimination in relation to the duty to work for and report on equality and anti-discrimination (ARP).

5.4 Possible challenges for evaluations

Many interviewees and respondents commented on several challenges that could arise when evaluating EDI measures. These reflections are based on their experiences from EDI work and presented in this section. In addition, they have shared their reflections on any external evaluations under the auspices of the EU or other external organisations, which we discuss in section 5.5.

5.4.1 Quantifiable vs. unquantifiable measures

Several interviewees reflected on challenges of evaluating measures that are not quantifiable. For example, one interviewee stated:

"...we created a new action plan and are left with the feeling that we're speaking in quite general terms. Because you can't create metrics. Even if you'd like to have target figures. But then it's not a metrics phenomenon: [...] for example, a goal of increased insight, understanding [or] knowledge. Maybe you start [creating] metrics, but that's when you start bothering people with: 'So, how much of this do you know?' Like a quiz, I don't know. It feels very strange." (university interviewee)

Interviewees had different perspectives on whether they should include measures that are difficult to quantify or not in the action plan. In an interview with research institutes and a government actor with R&D activities, interviewees shared that they had deliberately developed measures in the action plan that could be evaluated by counting them or "ticking off" those that were carried out. One of these interviewees stated:

"The type of measures we introduced [...] are of the type: 'measures we should initiate' or [measures where we aim to] have x number of something', so they are quite classic, smart targets. They should be quantifiable, but we haven't

introduced any measures that aim to shape attitudes. It shouldn't be something interpersonal or relational, [...] which is difficult to quantify, or answer yes or no to. [...] These types of measures [...] are difficult to evaluate, because [an evaluation would rely on] a feeling, an assumption that we have a [changed] attitude towards people from a certain country. So [...] we've basically steered clear of those types of measures and goals.” (government actor interviewee)

Another interviewee who participated in the same interview commented that their organisation similarly focused on ensuring quantifiable measures. One example this interviewee gave was “putting [EDI] on the agenda for managers” or “raising awareness among managers”. The interviewee said when they had raised the topic in relevant forums, “we have implemented it in some way”. The EDI actors in this interview expressed pragmatism. However, they also emphasised that whilst it may be relatively easy to evaluate the implementation of their institution’s measures, the implications can be unclear:

“[We've] put measures in place that have actually allowed us to obtain answers to what we've achieved. But I think, as Interviewee 17 says, that if we are to take some of the measures [...] further and continue them, then that may be a little more difficult to answer. But right now, I don't feel that it is difficult to deem whether or not we've achieved a measure.” (government actor interviewee)

In contrast to the pragmatism expressed in this interview, other interviewees emphasised that measures concerning issues such as belonging, attitudes and culture are also important, although more difficult to evaluate. In one interview, for example, it was said that while it is important to have target figures for gender balance in different types of positions, it is also important to work on creating cultural change in the organisation.

Another perceived challenge associated with less quantifiable measures is that they can be more difficult to communicate and follow up in the organisation. One interviewee had experienced that unquantifiable measures are taken less seriously, even though they are equally important.

“I find that interest wanes a bit when we can't quantify something. We just sort of loop back to the fact that we can't quantify it, and we can't document diversity to any real extent. But I believe there is a lot of [important] educational work and competence development and knowledge and so on.” (university interviewee)

The fact that some measures are easier to measure than others is also a key theme in the responses to the email survey. Respondents noted that it can be challenging to evaluate measures that aim to raise awareness and highlight values. One respondent pointed out that it is easy to confirm that leaders have completed a diversity management course, but that it remains unclear whether their behaviour

changes due to their participation. Several other answers from the respondents also convey the perception that certain EDI measures are more concrete and quantifiable than others, and therefore easier to evaluate, as noted the examples below:

“Many measures cannot be easily quantified, and it is time-consuming to evaluate them well enough” (university respondent).

“Some measures have been evaluated, but it has proved challenging. Evaluating all the measures is probably also quite resource-intensive” (university respondent).

“In our experience, measures that are specific and quantifiable are easier to evaluate than more general objectives” (university respondent).

“The more quantifiable a programme is – the easier it is to evaluate” (research institute respondent).

As these quotes indicate, some respondents have found that certain measures will require additional resources for evaluation due to these challenges. University respondents in particular stated that evaluating EDI measures is resource-intensive, while quantifiable measures appear to be less time-consuming. This may partly explain why several action plans refer to quantifiable variables, such as gender distribution based on statistical data (see Chapter 3), rather than, e.g., perceptions of gender balance or gender identity in the organisation.

5.4.2 Difficult to evaluate the effect of EDI measures

Interviewees have also noted that assessing the effect of the measures can be complicated. One challenge is when EDI measures are integrated into other activities in the organisation. This can make it difficult to evaluate the impact of the EDI efforts. One interviewee stated that EDI work is part of the annual report, and that EDI activities are “baked into other activities that happen throughout the year”. For example, EDI work is part of the organisations’ working environment committee meetings that are held four times a year. Furthermore, the organisation’s HR staff adapt the EDI measures based on regular updates they receive on broader career development issues. The interviewee stated:

“Because we’ve integrated [the measures], which is a huge advantage, they are difficult to distinguish and evaluate. [...]. On the one hand, I think they become easier to implement, and we get more participants if [the measures] are well-integrated. This increases the probability that [the measures] will be continued afterwards. But [the measures] are difficult to evaluate on their own.” (research institute interviewee)

The interview findings also indicate that in larger higher education organisations, it can be challenging to determine whether changes in the EDI field are due to the implemented measures, which aligns with research literature (e.g., Schmidt & Caccace, 2017; Ahmed, 2012). One university interviewee stated: “Gender balance is easy to measure; that’s not the difficult part. [The challenge] is more whether the specific measures have any effect”.

Another issue raised by interviewees and respondents is that it can be difficult to distinguish the effects of the measures from changes caused by broader societal developments. In addition, interviewees emphasised that one should have a long-term view on the effects of EDI efforts and that the efforts therefore should not be evaluated too early, as discussed in the excerpt below from an interview with research institutes:

Interviewer: *Do you have any other opinions on evaluation?*

Research institute interviewee: *“I just think too little time has passed. We’ve had an action plan for three years and now have a new one (...) I’m sure there are some results we can measure, but then I think: are they genuine? I feel that if we’re actually going to be able to measure whether there has been a positive development solely due to the work we do at [the institute] – and not [because of developments] in society as a whole, I think we need five years. That’s kind of where we are now.”*

As in the interviews, several survey respondents stated that it can be difficult to establish a causal relationship and to distinguish between evaluating the measures and assessing their effects. For example, one university college respondent stated that “many factors affect ‘the result’”, adding that it is “problematic to explain the reasons for changes or lack of changes”. Findings from the email survey indicate that it can be challenging to disentangle the effect of a measure from the effects of other activities and processes that can contribute to the same outcome (e.g., cultural change in the organisation).

5.4.3 Documentation challenges

Another challenge during the evaluation phase is that some EDI work addressing topics that are difficult to resolve is not always documented. An interviewee highlighted that when the recruitment base among students and qualified professionals is already skewed (see 4.6), efforts in this area are not necessarily systematically reported:

“We have a research unit [in this university] which has zero female professors, and they’ve worked hard to get some, but haven’t been able to. They try, try, try, try, but aren’t able to do it. This [work] is not visible in a report. You can’t quantify it.”

We can't say that we've tried and tried and tried. [...] There is information that disappears with that type of reporting." (university interviewee)

Without having such reports in place, evaluations will not always succeed into identifying such processes. This raises the question of what, if anything, is meaningful to evaluate: the work process or whether the measure has the intended effect?

An interviewee remarked that certain measures that can seem quantifiable, could actually be counterproductive to quantify when the intended goal is non-quantifiable. The interviewee shared that an aim behind some of the organisation's measures is to enhance well-being and foster a sense of belonging for everyone but that these aims are more challenging to measure over time than representation of gender among employees. The interviewee elaborated:

"We don't only want [targets of] 50-50, or 40-60 [in gender balance]. We also want [to promote] a stronger sense of belonging [...], so that people can do their best at work. [And so that] they don't have to [...] think too much about how to present themselves – and just do their job. [...] With evaluation, we want to know what the difference is between before and after. Meaning, what are the consequences of these measures? It's not always easy to find ways to figure it out." (research institute interviewee)

The interviewee also shared the challenge of communicating the purpose of EDI work to the organisation, if the achieved goals that cannot actually be quantified are nevertheless quantified. The interviewee believed that the quantification of such measures could affect the culture in the workplace:

"When talking to people in the organisation, [...] we have the same kind of regular [...] figures that we extract, [...] [but] what does that do to the culture? What does that do to the perceptions people have at work? This is very difficult to report on, but it's part of the culture." (research institute interviewee)

The interviewee stated that the aim of the measures is that colleagues do not see one another as people of a certain gender, a disability, or nationality, but first and foremost as colleagues. If this is achieved, then the work has been successful. Hence, it can be counterproductive to "divide people into groups again", the interviewee added (cf. Bond & Pyle, 1998). The interviewee concluded: "So I think it's challenging to report on things that are actually contrary to the message we want to promote." This challenge is thus linked to both evaluation as such and how to communicate EDI work in ways that promote inclusion.

Some interviewees highlighted challenges of documenting sensitive information about certain sub-groups in surveys and evaluations. Some also expressed that they are unsure about what is legal in this context. In one institution where

an evaluation was conducted, they considered to gather such information. The interviewee from the institution stated that “it's a bit unclear” what questions can be included in a survey. For example, they were uncertain whether it is permissible to ask questions about sexual orientation, gender, and religion. Due to this sensitivity and the lack of internal permission, the organisation chose instead to limit the evaluation to a qualitative assessment of which measures had been implemented and how they had functioned. However, the interviewee expressed that they wanted to learn more about the experiences of people with these characteristics. EDI actors from other institutions also emphasised that mappings conducted among minority groups may be useful. It was noted that such mappings can lay the foundation for developing new, relevant measures, but also in this context the challenge of collecting sensitive data was highlighted. Finally, one respondent at a research institute noted that in smaller organisations, it can be challenging to develop metrics and statistics, alluding to that such environments are more transparent.

5.5 Views on external evaluations

During the interviews, we asked interviewees about their opinions on a potential external evaluation by the EU, as the EU's plans to establish a monitoring and evaluation framework is the background for this research assignment. The interviewees had several reflections about this, which is the topic of this section. In Chapter 4, we showed that several institutions modified their action plan and measures before the end of the action plan period, based on the experience they gathered. This could make an evaluation challenging. An interviewee who shared that their institution modified the action plan during the institution's annual review (see Section 4.1), expressed that external evaluations can be unfortunate because they can generate a lot of work which can disrupt the progress of the work based on what is continually learnt within the organisation:

“... as you [another interviewee] mentioned, additional [external] reporting could be [...] negative. Because then we could say, ‘now we’ve had this in the action plan, and it hasn't worked’. Then we would have to report that it hasn't worked. And then maybe people would start asking why it hasn't worked. We would then have to start explaining, which would set the ball rolling, right? Instead of [improving] what we actually can work with [based on] that we see that okay, this hasn't worked, so we have to do something else. [...] That is the purpose of this action plan; [...] instead of announcing that it isn't working, which seems unnecessary to me. But I feel that an [internal] evaluation would have to be done in any case. Otherwise, the plan would just lie there untouched.” (research institute interviewee)

Another interviewee from a research institute thought that external evaluations by the EU would be more relevant for larger institutions. The interviewee expected that research institutes will continue to carry out evaluations and follow-ups as they do now. Another participant in the same interview said:

“I [...] hope [external evaluation by the EU] doesn't lead people to try fewer things. Or that they only rely on what can actually be reported on or evaluated in a quantitative way, because they would have to present it. So I hope people won't shy away from trying new measures. Or maybe we should just call it something else. So that we don't have to report to the EU on whether it works. That [would mean] more bureaucracy and things that are already quite demanding.” (research institute interviewee)

Relatedly, another participant in the same interview stated:

“There is something about [...] adding more and more guidelines and more and more requirements that somehow don't contribute to better work. It would be interesting if they came up with a bit more advice and tips, and perhaps some best practices – what has worked and what do we see? It could be that Norway is a bit different from many other European countries. I often feel that these guidelines are not always adapted to the Norwegian model, but we'll see.” (research institute interviewee)

Respondents to the email survey were not asked about their views on external evaluations. Nevertheless, one respondent mentioned that it was “Good to have external requirements (including policy documents, requirements from the EU/the Research Council of Norway)” (university college). In the next chapter, we will go into more detail on how one can interpret such views, and the study's overall findings, in light of existing research.

5.6 Summary – follow-up and evaluation of measures

In this chapter, we have presented the following findings:

- Most respondents reported that their organisations have follow-up procedures for the action plan's EDI measures. One in five responded that they do not have such procedures.
- All employers in Norway are required to make an annual report on its work for equality and anti-discrimination (“Aktivitets- og redegjørelsesplikten”, ARP). We find that several institutions use this report to follow up on the status of EDI measures. Other follow-up procedures include regular meetings, interaction with other organisational bodies (such as the working environment

committee or management), and employee feedback (e.g., working environment surveys, employee interviews, or direct contact).

- Some respondents, particularly those from university colleges, evaluate EDI measures when they revise their EDI action plan or prepare a new EDI action plan.
- Organisational reporting is mentioned as an important follow-up tool.
- Procedures for evaluating EDI measures may be more established among universities, while procedures for follow-up may be more established among research institutes and university colleges.
- In the institutions where evaluations have been conducted, these primarily assess whether the action plan's EDI measures have been implemented, and not their effect.
- EDI actors emphasise that some measures are not easy to measure and evaluate. Some interviewees are pragmatic and have only included measures in the action plan that can be easily evaluated, while others emphasise that “less tangible” goals are also important.
- When evaluating EDI measures, it can be challenging to establish causality, particularly in larger institutions.
- EDI actors' views on external evaluations vary. Some expressed that increased reporting could detract from the actual progress of the EDI efforts within the organisation. Others stated that external requirements are beneficial.

6 Discussion

This report has presented findings from a document review of EDI Action Plans in Norwegian research institutions, as well as findings from an email survey and focus group interviews on EDI actors' experiences with implementation, follow-up and evaluation of EDI measures. In this final chapter, we will highlight some recurring topics, dilemmas and challenges that we see across the findings and discuss some key topics in relation to research literature. In particular, we will address findings about evaluation-related challenges. This topic is emphasised since the background for this commissioned project was the EU's plans to create a framework for evaluating EDI work in academia.

6.1 Type of measure – to quantify or not to quantify?

The findings from all three methods show that some measures are easier to evaluate than others. In the document analysis, we found that many action plans have measures related to quantifiable phenomena, particularly those related to gender equality, such as the proportion of women in senior positions, the proportion of women recruited, and/or pay policies. Most action plans have measures of this type. This is not surprising, given that the institutions are obliged to quantify gender distribution in their annual report about their work on equality and anti-discrimination (The Equality and Anti-Discrimination Ombud, n.d.). We also found that smaller institutions often only include such measures in their action plans. In addition, some action plans have measures that are often quite difficult to quantify and evaluate, such as changes in attitudes over time.

In the interviews and survey, several EDI actors shared that their institution uses the annual compulsory report on equality and anti-discrimination (ARP) to identify needs and follow up work with the EDI Action Plan measures. However, this does not fully explain why quantifiable measures are given more weight in certain places, as part 2 of the duty to work for and report on equality and anti-discrimination also requires that the institutions address *how* the work is carried out, for all grounds of discrimination (the Equality and Anti-Discrimination Ombud, n.d.). One possible reason for the emphasis on quantifiable measures is that

it can be more challenging to evaluate measures that are more difficult to quantify. Interviewees varied with regards to whether they want to include unquantifiable measures in the action plan. Some expressed pragmatism, stating that they have included only quantifiable measures in their plan. Others stated that goals that cannot be easily evaluated are also important to include in the action plan even though they found it hard to design such measures in a way that makes them evaluable. One interviewee noted that, in some cases, using quantitative measures to assess representation could be counterproductive. The interviewee expressed that such assessments may fail to convey the more qualitative goals of the measures, such as fostering a sense of belonging, promoting well-being, and being recognised as a colleague rather than just as a representative of a specific category (see also Ahmed, 2012).

Our findings also show that not everyone is comfortable with sharing details of their own background. This may be due to a fear of differential treatment, both positive and negative. Furthermore, personal identity does not always align with statistics (such as the experience of being Norwegian). As with all dilemmas, there is no universal solution to when it is suitable to render difference visible. Acknowledging diversity can be just as problematic as overlooking it, as both approaches carry the risk of stigmatisation depending on the person and situation (Norwich, 2014; see also Bond & Pyle, 1998). It can be beneficial to be aware of this dilemma when developing and implementing EDI work.

The findings also highlight that employers may not be entitled to access certain types of diversity information, such as details about sexual orientation or functional variations, which may also be a barrier to documenting the status on diversity and anti-discrimination work within the organisation. Furthermore, we find that rules regarding when HR staff can register employee representation – before, but not during an interview – will impact what can be documented at the institution.

One characteristic of EDI work in academia, particularly in larger higher educational institutions, is that it entails efforts that address both administrative issues (such as appointments), and epistemic issues (i.e., knowledge development) (Vilhena et al., 2024). In both the interviews and email survey, EDI actors only rarely talked about measures related to knowledge development. However, one interviewee from a large organisation emphasised the importance of anchoring EDI efforts in both administrative and academic management¹⁵ and highlighted epistemic change. Similar to measures aimed at influencing organisational culture and attitudes, epistemic measures can often be more difficult to quantify (although aspects such as representation in curriculum lists can be quantified to some degree).

¹⁵ As noted, Norwegian higher education institutions have a dual leadership: one administrative line and one academic line.

In addition, the fact that we find few epistemic measures may reflect the fact that the majority of the sample in the email survey and document review are research institutes. The dual mandate may be most relevant for EDI measures in large higher education organisations that conduct basic research and develop study programmes. Research institutes may have limited flexibility in terms of funding and time to work systematically and comprehensively on epistemic measures (even though such institutions can address epistemic issues on a smaller scale). However, the general question of whether an institution should focus solely on quantifiable measures or also on other measures (e.g., those related to attitudes and inclusion) is relevant regardless of the type of institution. Indeed, we find that interviewees across different types of institutions stated that such less quantifiable goals are important for their EDI efforts. The interviewees differed in their opinions on whether these goals should be included in the action plan, and not in their views on whether their organisation generally should work towards the inclusion of a broad range of employees.

6.2 Experiences with diversity measures and documentation

The findings indicate that working on measures related to diversity dimensions beyond gender is new terrain for many research organisations. This reflects developments in other European countries (Musubika & Lotherington, 2025). Some EDI actors thought that diversity efforts are under-prioritised in their institution, while others described certain challenges associated with working on diversity dimensions other than gender. In particular, the data shows that it can be challenging to document and evaluate the representation of other dimensions than gender balance. One can expect that documenting such dimensions in combination with other areas of diversity (such as intersectionality), would further complicate matters. However, intersectionality was not particularly emphasised by the interviews. Interviewees discussed in greater detail how or whether they should document efforts aimed at certain dimensions – such as sexual orientation and disabilities – at all.

The findings indicate that some institutions experience a need for knowledge development in diversity measures and diversity management. However, the findings also highlight genuine challenges associated with institutional diversity efforts that there are no straightforward solutions to (see e.g., Brøgger and Andersen, 2024). The findings show that many EDI actors are aware of and actively engage with such dilemmas. Based on this study's data, it is not possible to conclude on the extent to which Norwegian research institutions and EDI actors are aware of existing documentation tools. Some EDI actors expressed uncertainty about what is and is not legal. Some interviewees highlighted not only “technical” and

legal challenges in how to proceed with documenting representation, but also ethical ones. At the same time, some interviewees expressed that such documentation could be useful data in the EDI work but that they felt uncertain about how to proceed and what would be permissible. The findings indicate that it may be useful for the KIF Committee or other actors to conduct a quantitative survey of the need for more knowledge of legislation and tools for mapping various diversity dimensions within institutions. In this way, needs for knowledge about practical solutions can be distinguished from acknowledging the genuine dilemmas actors face in their diversity efforts. Both the awareness of dilemmas and knowledge of tools are important for navigating the diversity field, and the quality of the work will depend on both.

6.3 Collaboration between institutions

One interviewee raised the question of whether the results of EDI efforts should be viewed solely within one institutional context or as a contribution to a collective, societal effort. Another EDI actor pointed out that academic institutions do not compete in their EDI efforts and called for more collaborations between universities on EDI work. Some EDI actors shared experiences that co-operation and collaboration across institutions had been helpful. Even though every institution is required to report annually on its discrimination and equality work and must have its own EDI Action Plan to receive certain research funding, there are also some measures that can benefit the whole sector. One example is the current development of a course about diversity management within the higher education sector (KIMU)¹⁶. Could another potential benefit from sector cooperation be that a smaller research institution, where the visibility of social groups can be more sensitive, uses statistics from the whole sector or parts of it as a basis for demonstrating the overall development of EDI efforts in Norwegian academia? This acknowledges the challenges with sensitive data in smaller institutions while enabling actors from these institutions to engage in discussions on EDI efforts with colleagues.

6.4 Adjustments of EDI measures

The research literature points out that change processes in EDI efforts are non-linear and that outcomes are not always predictable (Vilhena et al., 2025; Kalpazidou Schmidt & Pedersen, 2025; Nadiv & Kuna, 2020). Continuous adjustments and monitoring are recommended, as the outcomes of EDI efforts are not always as intended and the context may change over time (Kalpazidou Schmidt and

¹⁶ <https://kifinfo.no/nb/2025/10/na-skjal-forskningssektoren-bli-bedre-pa-mangfoldsledelse>

Pedersen, 2025). During implementation, one may discover that the needs one sought to meet differ somewhat from the knowledge one had when the measure was developed, highlighting the necessity for a better understanding of the problem (see also Suboticki & Sørensen, 2022). The effects of the work should be understood from a long-term perspective (Vilhena et al., 2025, p. 6). The significance of context has implications for evaluation design and the extent to which a successful implementation in one setting can be applied to different times and environments.

Several of our findings can be viewed in light of this previous research, which emphasises non-linearity and challenges of assessing the effects of the efforts. We find that adjustments of the measures happen along the way at several research organisations, and not only at the end of the action plan period. The ability to make adjustments during the implementation process allows EDI efforts to be initiated and adapted as an understanding of the problems and approaches evolves. However, a need for adjustments during the implementation process can complicate external evaluations once the action plan is completed. Additionally, some interviewees expressed that external evaluation could be disruptive to the ongoing development of work-based learning. This may be particularly relevant for institutions where the action plans are more recent.

Research literature on university governance points out that strategic plans can serve as a tool for legitimisation (Stensaker et al., 2019), which signals the institution's (intended) priorities to the outside world. EDI Action Plans can communicate an institution's measures to promote equality, inclusion, and diversity, but one related pitfall can occur if the EDI plans are developed solely to meet new requirements and maintain a sense of legitimacy, without being properly implemented or followed up (see also Baltaru, 2022). Another pitfall can arise if the guidelines for follow-up and evaluation of the measures are not appropriate. The research institutions have different durations for their EDI Action Plans. Some have had these plans for a long time, while many institutions – particularly in the research institute sector – have only implemented them recently, starting in 2021-2022 (Kifinfo, 30 January 2023, personal communication with Kristin Aukland, Kifinfo). This does not imply that the work on EDI measures is entirely new. For example, several institutions have had BALANSE action projects. Other organisations have also been subject to national acts and guidelines for their work well before 2022, including the Equality and Anti-Discrimination Act and its predecessors. There have also been numerous international requirements, guidelines and resources for work on equality, diversity and inclusion in research institutions. At the same time, the work on such measures has expanded with the introduction of the EDI action plans, and many new measures have been developed. This is evident in the interview findings. The interviews show that several institutions are in a

testing phase, in which measures and action plans are adjusted during the initial learning period, and interviewees report that they experience progress on this work. We also saw that some organisations actively utilise existing procedures to assess the status of both the working environment (e.g. work environment surveys) and EDI measures (e.g., the annual compulsory report on equality and anti-discrimination work). The integration of these procedures and the work on the EDI Action Plan measures also appears to be in an early phase in some institutions. In institutions where the action plans are new, several interviewees see a particular need for adjustments to the measures and the action plan. External evaluation may be premature for the work on EDI Action Plans at certain research institutes where the plans are new, as they are still developing their routines and measures in this early phase.

6.5 Specific versus less specific measures

In the document analysis, we found that the action plans often refer to *who* is responsible for implementing and following up measures, without describing *how* the follow-up should be conducted. In the interviews and email survey, EDI actors expressed that successful implementation is supported by defining responsible persons for the measures in the action in the action plan. At the same time, the document review indicates that the measures are often not clearly defined in the action plans. There may be various reasons for this. One reason may be that a broad concept of diversity that embraces “everyone” can make it difficult to delimit and operationalise measures that encompass many groups. Conversely, if only a few selected groups are prioritised, it may be more feasible to design specific measures that are easier to operationalise. Another possible reason is that measures that are formulated in a more general way entails room for adjustments and modifications and may reduce implementation barriers. This may be particularly relevant when the action plan and subsequent measures are more recent, and the work is in an early learning phase. From this perspective, somewhat broader formulations might be beneficial in the initial phase. However, there is a risk involved in using very broad formulations, as this can make it difficult to assess whether the measures have been implemented and followed up at all. This can especially be the case if the measures are not assigned to responsible individuals, as our findings suggest this is crucial for successful implementation.

6.6 Anchoring and challenges with evaluation

Research that analyses institutional change through complexity theory emphasises that the non-linear processes and multiple factors involved in change efforts

make it challenging to evaluate the effects of EDI Action Plans (Kalpazidou Schmidt & Pedersen, 2025). Also in our study, EDI actors recognised that EDI measures involve long-term efforts, and some emphasised that the measures should not be evaluated too early. EDI actors in large higher education organisations described the implementation and follow-up of EDI measures as extensive, and some described the EDI work in such organisations as “cumbersome”. EDI actors also highlighted that it can be difficult to separate the effects of the EDI measures from other developments, particularly in large organisations.

In smaller research organisations, there is a shorter distance between employees and managers, which can facilitate anchoring of EDI work in management. Our findings indicate that several EDI actors have had positive experiences with implementation when the measures are supported by management. Some EDI actors also mentioned positive experiences with incorporating measures into existing organisational procedures. We have not conducted an evaluation, but from the perspective of EDI actors, these findings indicate that anchoring and incorporation into other organisational procedures can promote good implementation processes. However, precisely the same factors can make it difficult to evaluate the impact of the measures.

6.7 Some thoughts on future studies

This study has examined how the implementation, follow-up and evaluation of measures are described in EDI Action Plans and by EDI actors at Norwegian research institutions. We find several commonalities of experiences and challenges across different research fields and types of institutions. We find that many EDI actors expressed progress in the work by trying out the measures and adjusting both the measures and action plans based on what they learn. Moreover, many reported that they have experienced good collaboration with other individuals and units within their organisations. We also find that EDI actors across different types of institutions highlighted similar challenges, e.g., those related to quantifiable versus less quantifiable measures.

In several empirical sections of the report, we have referred to diversity management research. This is a long-standing field that usually is separate from research on EDI efforts in academia. Several of our findings address challenges and dilemmas that have been reviewed, discussed, and theorised in depth within diversity management research (e.g., Brøgger & Andersen, 2024; Bond & Pyle, 1998). For future research, it would be fruitful to integrate the two disciplines more closely. This seems particularly useful as diversity measures in academia are neither sufficiently researched nor sufficiently theorised. By connecting the diversity management literature to empirical and theoretical analyses of EDI measures

in academia, one can draw on these insights while highlighting the distinct nature of academic institutional contexts for EDI efforts.

Future studies could benefit from examining EDI efforts in larger Norwegian higher education institutions, where this work is particularly complex. In addition, further research should investigate EDI efforts across organisations of various sizes from the perspectives of different actors (Egeland and Drange, 2022 is one important contribution). This study has explored EDI actors' perspectives on EDI work in their organisations. However, issues related to implementation, anchoring, and resistance can be perceived differently depending on an individual's position within the organisation, as different roles and units tend to have varying priorities and viewpoints. Future studies that also address how managers, colleagues, and students perceive the EDI Action Plan and efforts could expand our knowledge on implementation and follow-up of the plans. Furthermore, research into how the target groups for EDI measures perceive them would also be of interest, as are the views of those not targeted by the measures.

This study's findings illustrates that many organisations are in the early stages of evaluating and following up on measures. Other institutions, however, have a long track record of working with measures for gender equality, and some also for diversity. In both cases, it would be useful with longitudinal studies that researches how this work develops over time.

Additionally, mapping examples of best practices can be beneficial for the research sector, provided the analysis considers the significance of institutional context. Our study was not aimed at determining which measures or procedures are most effective. However, some of our findings indicate the importance of anchoring, that the action plan assigns responsible persons for the measures, and that several individuals are responsible for their implementation. It can be useful to investigate this further in future research from the perspectives and experiences of different actors.

List of figures

Figure 2.1 Number of respondents who completed the email survey, broken down by institution type and position	25
Figure 3.1 The institutions' action plans and the extent to which they describe measures for equality, diversity and inclusion.	30
Figure 3.2 Description of follow-up of EDI measures in the institutions' action plans	30
Figure 3.3 Description of evaluations of EDI measures in the institutions' action plans	31
Figure 3.4 Illustration of what a comprehensive process and planning for EDI measures can look like.....	33

References

- Ahmed, S. (2012). *On being included: Racism and diversity in institutional life*. Duke University Press.
- Askvik, T. & Drange, I. (2019) Etnisk mangfold i akademia. *Spotlight on working life*. 2019;36(3):194-210 <https://dx.doi.org/10.18261/iss.1505-7989-2019-03-06>
- Baltaru, R.-D. (2022). The rise of agentic inclusion in the UK universities: maintaining reputation through (formal) diversification. *Studies in Higher Education*, 47(1), 229-242. <https://doi.org/10.1080/03075079.2020.1739015>
- Bond, M. A. & Pyle, T. L. (1998). Diversity Dilemmas at Work. *Journal of Management Inquiry*, 7(3), 252-269. <https://doi.org/10.1177/105649269873007>
- Brooks, R.A. Clyburn, T., Milton, L., Valentino, R., Walker, B. & Williams, D.A. (2018). *Diversity Plans Can't Breathe without AIIR: Building a High-Caliber Diversity Initiative*. <https://hdl.handle.net/2022/25819>
- Brøgger S.R. & Andersen, M.D. (2024). Reconceptualising diversity management from a paradox lens. *Equality, Diversity and Inclusion: An International Journal*, Vol. 43 No. 4 pp. 656–669, doi: <https://doi.org/10.1108/EDI-01-2023-0029>
- Buudir (2021). *Aktivitets- og redegjørelsesplikt (ARP) for arbeidsgivere*, retrieved November 2025 from https://www.buudir.no/fagstotte/produkter/aktivitets_og_redegjorelsesplikt_for_arbeidsgivere/#heading-contentlink-7705
- Council of the European Union (2015). *Advancing gender equality in the European Research Area*, Outcome of proceedings, Brussels. <https://data.consilium.europa.eu/doc/document/ST-14846-2015-INIT/en/pdf>
- Duarte, M., Losleben, K. and Fjørtoft, K. (2023). Introduction, in Duarte, M., Losleben, K. and Fjørtoft, K. (eds.), *GENDER DIVERSITY, EQUITY, AND INCLUSION IN ACADEMIA. A Conceptual Framework for Sustainable Transformation*, London: Routledge, s. 1-16. <https://doi.org/10.4324/9781003363590>

- Egeland, C. (2023). *Likestillings- og mangfoldsarbeidet i forskningsinstitusjonene – nå og framover*. AFI, OsloMet.
- Egeland, C. and Drange, I. (2022). *Handlingsrom for kjønnsbalanse og mangfold. Hva preger arbeider for kjønnsbalanse og mangfold blant høyere utdannings- og forskningsinstitusjoner?* AFI-rapport 2022.11. Work Research Institute (AFI), OsloMet.
- Equality and Anti-Discrimination Act (2018). *Act relating to equality and a prohibition against discrimination*, Ministry of Culture and Equality. Lovdata. <https://lovdata.no/lov/2017-06-16-51>
- Equality and Anti-Discrimination Ombud (LDO) (n.d.). *Aktivitets- og redegjøringsplikt (ARP)*, retrieved November 2025 from <https://ldo.no/bli-betre-pa-likestilling-og-mangfold/aktivitets-og-redegjorelsesplikt/#ombodetsi-rolle-i-arbeidet-med-arp>
- Erdal, M. B., Knutsen, C. H., & Midtbøen, A. H. (2019). Internationalisation, diversity and discrimination in Norwegian academia. *Nytt Norsk Tidsskrift*, 36(3), 288-295. <https://doi.org/10.18261/issn.1504-3053-2019-03-1>
- European Institute for Gender Equality (n.d.). *Gender Equality in Academia and Research – GEAR tool*, Retrieved 7 October 2025 from <https://eige.europa.eu/gender-mainstreaming/toolkits/gear/what-gender-equality-plan-gep>
- Flikke, J. K. (2024). Identifying What is Missing: International Diversity and Inclusion in Norwegian Academia. *Nordic Journal of Social Research*, 15(1), 1-13. <https://doi.org/10.18261/njsr.15.1.3>
- Holter, Ø.G. and Snickare, L. (2022). *Gender Equality in Academia – From Knowledge to Change*. Cappelen Damm Akademisk.
- Kalpaizidou Schmidt, E. and Pedersen, A.V. (2025). Beyond Policy: The Odyssey of Implementing GEPs in European Academia. *Social Inclusion*, 13, Article 9876. <https://doi.org/10.17645/si.9876>
- Kifinfo (30 January 2023). *Aldri har det vært så mange planer for likestilling, men hvem sikrer kvaliteten?* retrieved 3.11. from: <https://kifinfo.no/nb/2023/01/aldri-har-det-vaert-sa-mange-planer-likestilling-men-hvem-sikrer-kvaliteten>
- Kifinfo (n.d.). *Handlingsplaner for likestilling og mangfold*, retrieved 7 October 2025 from: <https://kifinfo.no/nb/content/handlingsplaner-likestilling>
- Kifinfo (n.d.). *News and resources on gender balance and diversity in higher education and research*, retrieved 7 October 2025 from: <https://kifinfo.no/nb>
- Köllen, T. (2019). Diversity Management: A Critical Review and Agenda for the Future. *Journal of Management Inquiry*, 30(3), 259-272. <https://doi.org/10.1177/1056492619868025>

- Kvale, S. (2007). *Doing interviews*. (Vols. (1-0)). SAGE Publications, Ltd, <https://doi.org/10.4135/9781849208963>
- Lagesen, V., Flikke, J., Sletten, M. & Sørensen, K. (2025). From Authoritative Voices to Dialogical Policy-Making: How Norwegian Universities Navigate Diversity Implementation. *Social Inclusion*, 13, Article 9999. <https://doi.org/10.17645/si.9999>
- Maximova-Mentzoni, T., Egeland, C., Askvik, T., Drange, I., Støren, L.A., Røsdal T. & Vabø, A. (2016). «Å være utlending er ingen fordel.» *Karriereløp og barrierer for innvandrere i norsk akademia*. AFI-rapport 2016:03. Oslo: University College of Oslo and Akershus (now Work Research Institute (AFI), OsloMet).
- Midtbøen, A. (n.d.) *Diversity in Academia – What's the Problem?* [diversity management english folder print.pdf](https://doi.org/10.17645/si.9999)
- Ministry of Culture and Equality (2019). *Et samfunn for alle. Likestilling, demokrati og menneskerettigheter*, Regjeringens handlingsplan for likestilling av personer med funksjonsnedsettelse 2020-2025. Norwegian Government.
- Musubika, S., & Lotherington, A. (2025). Dissecting Discourses in Policy: Diversity, Equity, and Inclusion (DEI) Problematizations in Academia. *Social Inclusion*, 13, Article 9855. <https://doi.org/10.17645/si.9855>
- Nadiv, R., & Kuna, S. (2020). Diversity management as navigation through organizational paradoxes. *Equality, Diversity and Inclusion: An International Journal*, 39, 355-377.
- Norwich, B. (2014). Recognising value tensions that underlie problems in inclusive education. *Cambridge Journal of Education*, 44(4), 495-510. <https://doi.org/10.1080/0305764X.2014.963027>
- Owesen, I. W., & Aarseth, H. (Ed.) (2022). *Kjønn og akademia. På vei mot BALANSE?* Fagbokforlaget. <https://doi.org/10.55669/oa160808>
- Pedersen, T.D., Flobakk-Sitter, F., Slette, A.L. & Korseberg, L. (2025). *Tilgjengelighet i høyere utdanning. Innblikk i UH-institusjonenes arbeid med tilgjengeliggjøring av og i studietilbudene*. NIFU-rapport 2025:5, NIFU. <https://hdl.handle.net/11250/3176173>
- Research Council of Norway (2021). *Krav om handlingsplaner for likestilling (GEP)*, downloaded 31 July 2024 from <https://www.forskningsradet.no/finansiering/fatt-midler/handlingsplaner-likestilling-gep/>
- Schmidt, E. K. & Cacace, M. (2017). Addressing gender inequality in science: the multifaceted challenge of assessing impact. *Research Evaluation*, 26(2), 102-114. <https://doi.org/10.1093/reseval/rvx003>
- Seliverstova, Y. (2021). Workforce Diversity Management: A Systematic Literature Review. *Strategic Management*, 26 (2). 10.5937/StraMan2102003S

- Stensaker, B., Lee, J. J., Rhoades, G., Ghosh, S., Castiello-Gutiérrez, S., Vance, H., Çalikoğlu, A., Kramer, V., Liu, S., Marei, M. S., O'Toole, L., Pavlyutkin, I., & Peel, C. (2019). Stratified university strategies: The shaping of institutional legitimacy in a global perspective. *The Journal of Higher Education*, 90(4), 539–562. <https://doi.org/10.1080/00221546.2018.1513306>
- Suboticki, I., & Sørensen, S. Ø. (2022). Mellom likestilling og kjønnsbalanse. In I. W. Ovesen & H. Aarseth (Red.), *Kjønn og akademia. På vei mot BALANSE?* (s. 149–170). Fagbokforlaget. <https://doi.org/10.55669/oa160808>
- Sørensen, S. Ø., & Amundsdotter, A. (2025). Motstand og meningsskaping: Kollektiv læring som mobilisering i arbeid for kjønnslikestilling. *Tidsskrift for kjønnsforskning*, 49(1), 32–47. <https://doi.org/10.18261/tfk.49.1.4>
- Tardos, K. & Paksi, V. (2021). Can Equality Plans Contribute to the Sustainable Development Goal linked to Gender Equality in Higher Education and Research Performing Organisations? *Education of Economists and Managers*, 62(4), 35–53.
- Tardos, K., Paksi, V., Takács, J., & Bencivenga, R. (2025). Gender Equality Plans in European Research Performing Organisations. *Social Inclusion*, 13, Article 11369. <https://doi.org/10.17645/si.11369>
- Triana, MC., Gu, P., Chapa, O., Richard, O. & Colella, A. Sixty years of discrimination and diversity research in human resource management: A review with suggestions for future research directions. *Human Resource Management*. 2021; 60: 145–204. <https://doi.org/10.1002/hrm.22052>
- UN (n.d.) *UN Sustainable Development Goals*, retrieved 07.10.25 from <https://fn.no/om-fn/fns-baerekraftsmaal>
- Vilhena, F., Belloso, M., & Cabrera, M. (2025). The Complexity of Defining Institutional Change in Academia. *Social Inclusion*, 13, article 9981. <https://doi.org/10.17645/si.9981>
- Working Environment Act (2006). *Act relating to the working environment, working hours and employment protection, etc.*, Ministry of Labour and Social Inclusion. Lovdata. <https://lovdata.no/lov/2005-06-17-62>

Appendix 1

Research project on measures in action plans for equality, diversity and inclusion in Norwegian research institutions

Study topics: On behalf of the Committee for Gender Balance and Diversity in Research (the KIF Committee), NIFU is conducting a research project examining measures in action plans for gender equality, diversity, and inclusion (EDI) at Norwegian research institutions. In this project, we are researching how the measures in the action plans are implemented and evaluated in the organisations.

Methods: The methods we are using include focus group interviews, a qualitative email survey and a document analysis of the action plans. The main focus of the survey is on the experiences and perceptions of employees with the closest ties to gender equality and diversity efforts, such as managers in EDI committees, HR employees, diversity and equality advisers and management. The email survey will be sent to 33 research institutes, 33 universities and university colleges, and 7 government actors with R&D activities. In the focus groups, we will interview participants from a sample of these institutions.

Duration and publications: The duration of the project is from March 2025 to November 2025 and will result in an NIFU report. In addition, one or more academic articles may be written based on the data we collected for the project.

Anonymisation: All interviewees and respondents will be anonymised. Additionally, we will anonymise the participating research institutions to the extent this is possible. This means that in the written and verbal communication of the findings, we will not state specific universities/university colleges that participated in the focus groups. Nor will we state institutional affiliations when referring to the responses of interview participants and respondents in the email survey. In addition, we will endeavour to make information general in cases where interviewees and institutions can be identified from interviewee statements. However, in cases where there is a risk of indirect identification through the use of quotes or the

reproduction of statements, the individual concerned will have the opportunity to review the quotes before the results are published.

Confidentiality and data security: NIFU has good procedures for securing its data. The information provided in the interviews and email survey will only be used for the purpose described in this letter. At NIFU, four researchers are working with focus groups and the email survey, and only these researchers will have access to the primary data. We process information from interviewees and respondents confidentially and in accordance with data protection regulations. The data will be stored securely and encrypted on NIFU's server.

Consent: Final consent for participation will be given by completing the interview and participating in the email survey.

Voluntary participation: Participation is voluntary, and participants can withdraw their participation at any time without stating a reason. All data is then deleted.

Privacy and participation rights: This study has been reported to Sikt – the Norwegian Agency for Shared Services in Education and Research, which has assessed that the processing of personal data in this project complies with data protection regulations.

As long as you can be identified in the data material, you have the following rights:

- to access to your registered personal data,
- to rectify your personal data,
- to have your personal data erased,
- to receive a copy of your personal data (data portability), and
- to lodge a complaint with the data protection officer or the Norwegian Data Protection Agency regarding the processing of your personal data.

Further information: The data protection officer for the project at NIFU is Claes Lampi, who can be contacted about data protection at claes.lampi@nifu.no. Please feel free to contact me should you have any questions.

Kind regards,
Brit Lynnebakke
Researcher and project manager, NIFU – Nordic Institute for Studies in Innovation, Research and Education

Email: brit.lynnebakke@nifu.no

Tel. (+47) 942 51 004

Appendix 2

Focus group interview topics

At the start of the interview:

Information about the project, verbal communication of key points in the information letter: consent, the right to withdraw at any time, anonymisation, data storage.

Do you have any questions about the survey?

Would it be alright if we record this?

The interview

Introduction of the participants:

1. Ask the interviewees to introduce themselves with brief information about:
 - Their institution and role (how long have they held their role, any previous relevant experience from the same or other institutions)
 - Whether there are others in the institution with whom they collaborate on EDI efforts (equality, diversity and inclusion), and if so, the division of labour
 - How did you start this work? What led you to become interested in this field?

[The following questions will not necessarily be followed up chronologically. We will begin with the initial questions and allow the conversation to flow as naturally as possible, asking the questions from the guide and posing follow-up questions based on the interviewees' statements when this feels appropriate during the conversation.]

General experiences with EDI efforts

2. Could you first tell us what you think works well in your EDI efforts and any challenges you face?

3. Do you feel that your position in the organisation is suitable for EDI work? Advantages/disadvantages of your positioning in the organisation (e.g., who and what information sources do you have access to or not have access to?)

Experiences with implementation

We would now like to hear more about your experiences with implementing the measures in the action plan.

4. How has the implementation of the measures gone? Positive/negative experiences
 - What in your experience has promoted implementation?
 - What in your experience has hindered implementation?
5. Have the measures in the action plan been specific enough to implement? (Possible examples of measures that have been challenging to follow up and why)
6. What do you think is important for a good implementation of measures in the action plan?

Experiences with and views on evaluation (and reporting)

7. What do you think is important to document in the EDI efforts (to know if the measures have been implemented, how they have worked, and to identify learning points for further work)? Why is this important?
8. What procedures/measures do you think are important in order to know how the implementation was carried out?

Reporting

9. Do you have procedures/practices for reporting on how the measures in the action plan are implemented?
 - If yes:
 - a) Who would do this, and if so, what would they do?
 - b) Are there any factors that have hindered effective reporting (e.g., time, resources, measures involving multiple actors, etc.)?
10. Have you found that certain types of measures are easier/harder to report on than others?

Evaluation

11. Has the institution evaluated the implementation of any measures in the action plan? Who was involved in this work? How did it go?
12. If an evaluation/evaluations have been done: Are there any factors that have hindered a thorough evaluation (e.g., time, resources, measures involving multiple actors, etc.)?
13. Is there anything you feel was missing in your work on any evaluations (e.g., expertise, time, knowledge, etc.)?
14. Have you found that certain types of measures are easier/harder to evaluate than others?
15. At the EU level, there are plans to introduce requirements for research institutions to evaluate the implementation of measures in GEPs. What do you think is important to consider in this work? What challenges do you think are

important to be aware of? What do you think could promote or hinder a thorough evaluation?

[If time] Support, anchoring and resistance

16. Do you feel there is support/commitment for EDI efforts in your organisation? Do you have the impression that different parts of the organisation are aware of the measures? Please elaborate.
17. Have you experienced resistance in your organisation in your EDI work? In what ways, if any?
18. To what extent do you feel that the EDI work is anchored
 - a. in management (at different levels)?
 - b. Elsewhere in the organisation (other employees, possibly students)

[If time] EDI actor's background

19. What do you believe are important resources to bring to the EDI work (e.g., knowledge of the organisation, your own background, expertise, etc.)

Is there anything you would like to add/advise?

20. Is there anything you feel you haven't said during this interview that you would like to share?
21. Do you have any (other) advice for the KIF Committee and ERA (European Research Area) on how authorities and research institutions can promote good implementation and evaluation of the measures in the action plans?

Can we contact you if we have any follow-up questions?

Appendix 3

An overview of the institutions included in the document analysis¹⁷:

Universities

Nord University
Norwegian University of Life Sciences (NMBU)
Norwegian University of Science and Technology (NTNU)
Oslo Metropolitan University (OsloMet)
University of Agder
University of Bergen
University of Inland Norway
University of Oslo
University of Stavanger
University of South-Eastern Norway
UiT The Arctic University of Norway

Specialised university colleges

The Oslo School of Architecture and Design (AHO)
MF University
BI Norwegian Business School
Molde University College, specialized University in Logistics
Oslo National Academy of the Arts
Norwegian School of Economics
Norwegian School of Sport Sciences
Norwegian Academy of Music
VID Specialized University

Accredited university colleges

Ansgar University College
Queen Maud's College of Early Childhood Education (DMMH)
Fjellhaug International University College
The Norwegian Defence University College
Norwegian School of Leadership and Theology
Østfold University College
Volda University College
Western Norway University of Applied Sciences
Kristiania University of Applied Sciences
Lovisenberg Diaconal University College
NLA University College
The Norwegian Police University College
Sámi allaskuvla / Sámi University of Applied Sciences

¹⁷ The overview is based on a similar overview presented on the KIF Committee's website:
<https://kifinfo.no/nb/content/handlingsplaner-likestilling>

Research institutes with basic government funding

Technical-industrial institutes

Institute for Energy Technology (IFE)
NORCE Norwegian Research AS
Norwegian Geotechnical Institute (NGI)
NORSAR – Norwegian Seismic Array
Norwegian Computing Center
RISE PFI
SINTEF Independent research institute

Social science institutes

Chr. Michelsen Institute
The Fafo Research Foundation
The Fridtjof Nansens Institute
Peace Research Institute Oslo (PRIO)
Institute for Social Research
Møreforskning Research Institute
Nordic Institute for Studies in Innovation, Research and Education (NIFU)
Nordland Research Institute
Norwegian Institute of International Affairs (NUPI)
NORSUS Norwegian Institute for Sustainability Research
NTNU Social Research
Centre for Applied Research at NHH (SNF)
Telemark Research Institute
The Frisch Centre
Western Norway Research Institute

Primary business institutes

NIBIO – Norwegian Institute of Bioeconomy Research
Nofima – The Norwegian Food Research Institute
RURALIS Institute for Rural and Regional Research
Norwegian Veterinary Institute

Environmental institutes

CICERO Centre for International Climate Research
The Nansen Environmental and Remote Sensing Center (NERSC)
Norwegian Institute for Cultural Heritage Research (NIKU)
Norwegian Institute for Air Research (NILU)
The Norwegian Institute for Nature Research (NINA)
The Norwegian Institute for Water Research (NIVA)
Norwegian Centre for Transport Research (TØI)

Government research institutes

Norwegian Institute of Marine Research (IMR)
National Institute of Occupational Health (STAMI)
Simula Research Laboratory
Norwegian Defence Research Establishment (FFI)

Government actors with a primary purpose other than R&D

Norwegian Polar Institute
Norwegian Meteorological Institute
Norwegian Institute of Public Health (FHI)
Geological Survey of Norway (NGU)
The Norwegian Water Resources and Energy Directorate (NVE)
National Archival Services of Norway
National Library of Norway
Statistics Norway (SSB)

Nordisk institutt for studier av
innovasjon, forskning og utdanning

Nordic institute for Studies in
Innovation, Research and Education

www.nifu.no