



INSPIRE

D2.2 4 x Country-cluster reports, Member States country information

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Consortium

FUOC	Fundació per a la Universitat Oberta de Catalunya, Spain
JR	Joanneum Research Forschungsgesellschaft Mbh, Austria
SDU	Syddansk Universitet, Denmark
UJ	Uniwersytet Jagiellonski, Poland
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Executive Summary

This deliverable contains 4 Country Cluster Reports (CCRs) that are the outcome of a survey carried out by INSPIRE, a Horizon Europe project aimed at building a sustainable centre of excellence on inclusive gender equality in research and innovation (R&I). The survey was completed by 27 experts from the four clusters (Northern West, Central West, Southern and Central East and Eastern countries) representing the EU Member States. Each report compiles and analyses the results of the expert survey, which gathered information from each country regarding structural change aimed at promoting inclusive gender equality in R&I organisations for the four INSPIRE's domains: widening participation, deepening / sustaining change, intersectionality and innovation / private sector.

The objective of the CCRs is to provide crucial support to the INSPIRE project on structural change towards inclusive gender equality in R&I, by feeding into WP3 research (case studies) and supporting the Knowledge and Support Hubs (KSH) set up, identifying priorities for each KSH. Additionally, the information collected is a useful resource for the R&I ecosystem in Europe and beyond, including policymakers, researchers, and equality practitioners across Europe.

INSPIRE survey

The survey involved one expert in each EU27 Member State and provided crucial support to the INSPIRE research programme on structural change towards inclusive gender equality in R&I, through:

- collecting information and analysis on policy developments and research debates at the national level; and
- identifying engaged stakeholders, other potential experts and relevant resources in the country, as well as collecting suggestions to support existing or potential initiatives for developing new communities of practices (CoPs).

The survey focused on **structural change towards inclusive gender equality in R&I organisations** in the country, defined as a long-term, sustainable process aimed at building an institutional environment (values, norms, structures and procedures) in which inclusive gender equality is widely discussed and explicitly embraced in organisational and individuals' practices having a demonstrable impact on reducing gender and other axes of inequality and discrimination within the organisation.

A **Gender Equality Plan (GEP)** is an **instrument** to institutionalise a gender equality policy and implement a structural change process. In the survey, GEP was defined according to the eligibility criterion and minimum requirements established by the European Commission to participate in Horizon Europe. Organisations may adopt similar/equivalent instruments to implement structural change or alternative instruments. These **alternative instruments** may focus only on gender or be interventions that fall under the umbrella of Equality, Diversity, Inclusion (EDI) policies, or just diversity policies.



The survey addressed **five topics** of interest related to structural change:

- **Initiating change:** How organisations can be encouraged to adopt a gender equality policy (GEPs and equivalent/alternative measures) based on local knowledge, experience and change movements as well as evidence-based tools (e.g., gender equality audit).
- **Sustaining and deepening change:** How organisations can address resistances and sustain and deepen change by building institutional gender competence, dedicating resources and structures, promoting evidence-based measures and broadening the scope of intervention (e.g., integrating sex/gender analysis in curricula or research content; implementing a sexual harassment protocol).
- Adopting an **intersectional approach:** How organisations can move from GEPs and/or EDI interventions to inclusive intersectional GEPs fostering change towards equality.
- Implementing **gendered innovations:** How innovation clusters and private R&I companies can be encouraged to implement gendered innovations - that is to innovate by integrating methods of sex and gender analysis into their R&I products or services, ideally taking into account also other axes of inequality and discrimination.
- **Monitoring inclusive gender equality:** How organisations can support an evidence-based inclusive gender equality by implementing effective monitoring conceptual approaches, tools and indicators - in particular in the four topics identified above (initiating change; sustaining and deepening change; adopting an intersectional approach; implementing gendered innovations).

The survey addressed structural change in all types of R&I organisations:

- Research funding organisations (e.g., research Ministries and public bodies funding basic and applied research; innovation agencies; other public and private institutions funding research and/or innovation).
- Research performing organisations:
 - Higher education institutions (public and private)
 - Other public research performing organisations (publicly funded research institutes)
 - R&I companies (e.g., private companies providing R&I products or services)
 - NGOs and other non-profit research performing organisations (e.g., private R&I foundations)

Country cluster reports

The comparative analysis of the survey was conducted in four country cluster reports, covering the following EU countries:

- **North West** country cluster report: Denmark, Finland, Ireland, and Sweden.
- **Central West** country cluster report: Austria, Belgium, France, Germany, Luxembourg, and the Netherlands.
- **Southern** country cluster report: Cyprus, Greece, Italy, Malta, Portugal, and Spain.



- **Central East and Eastern** country cluster report: Bulgaria, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia.

The information used to elaborate these reports was collated by the following national experts:

- Austria Julia Greithanner, Florian Holzinger and David Walker¹
- Belgium Dounia Bourabain
- Bulgaria Georgi Apostolov
- Croatia Brigita Miloš
- Czechia Jana Dvořáčková
- Denmark Liv Baisner Petersen and Eva Sophia Myers²
- Estonia Martin Jaigma
- Finland Suvi Heikkinen
- France Suzanne de Cheveigné
- Germany Carolina Wienand-Sangaré, Merve Yorulmaz, and Susanne Bühler³
- Hungary Beáta Nagy
- Ireland Eileen Drew
- Latvia Nina Linde
- Lithuania Aurelija Novelskaitė
- Luxembourg Jennifer Dusdal
- Netherlands Yvonne Benschop⁴
- Poland Marta Warat and Karolina Sikora⁵
- Romania Monica Stroe
- Slovakia Alexandra Bitušiková
- Slovenia Martin Pogačar, Iva Kosmos and Jovana Mihajlović Trbovc⁶
- Spain Maria Caprile and Lorena Pajares⁷
- Sweden Minna Salminen-Karlsson

The deliverable is completed with a Methodological annex, which includes further details regarding the methodology followed to design the survey, collect the information and elaborate the reports. It also includes the full survey template as delivered to the experts.

¹ The experts from Austria are affiliated to JR, an institution member of the INSPIRE consortium.

² The experts from Denmark are affiliated toSDU, an institution member of the INSPIRE consortium.

³ The experts from Germany are affiliated to Fraunhofer, an institution member of the INSPIRE consortium.

⁴ The expert from the Netherlands is affiliated to SRU, an institution member of the INSPIRE consortium.

⁵ The experts from Poland are affiliated to UJ, an institution member of the INSPIRE consortium.

⁶ The experts from Slovenia are affiliated to ZRC SAZU, an institution member of the INSPIRE consortium.

⁷ The experts from Spain are affiliated to Notus, an institution member of the INSPIRE consortium.



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3. Southern country cluster report
4. Central East and Eastern country cluster report
5. Methodological annex



INSPIRE

D2.2 North West Country Cluster Report

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List of Acronyms

CCR	Country Cluster Report
CoP	Community of Practice
CV	Curriculum Vitae
EC	European Commission
EDI	Equality, Diversity and Inclusion
EO	Equal Opportunities
ERA	European Research Area
EU	European Union
GE	Gender Equality
GEP	Gender Equality Plan
GBV	Gender-based violence
HE	Higher Education
HEI	Higher Education Institution
HR	Human Resources
ICT	Information and communications technology
NAP	National Action Plan
NGO	Non-governmental Organisation
RFO	Research funding organisation
RPO	Research performing organisation
R&I	Research and Innovation
R&D	Research and Development
SDG	Sustainable development goals
STEM	Science, Technology, Engineering, Mathematics



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1 Introduction

This is one of the four country cluster reports which analyse the results of the expert survey conducted by INSPIRE, a Horizon Europe project aimed at building a sustainable centre of excellence on inclusive gender equality in research and innovation (R&I).

INSPIRE survey

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- collecting information and analysis on policy developments and research debates at the national level; and
- identifying engaged stakeholders, other potential experts and relevant resources in the country, as well as collecting suggestions to support existing or potential initiatives for developing new communities of practices (CoPs).

The information collected was also meant to be a useful resource for the R&I ecosystem in Europe and beyond, including policy makers, researchers and equality practitioners across Europe.

The survey focused on **structural change towards inclusive gender equality in R&I organisations** in the country, defined as a long-term, sustainable process aimed at building an institutional environment (values, norms, structures and procedures) in which inclusive gender equality is widely discussed and explicitly embraced in organisational and individuals' practices having a demonstrable impact on reducing gender and other axes of inequality and discrimination within the organisation.

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 - R&I companies (e.g., private companies providing R&I products or services)
 - NGOs and other non-profit research performing organisations (e.g., private R&I foundations)

Country cluster report

The comparative analysis of the survey was conducted in four country cluster reports: North West countries, Central West countries, Southern countries and Central East and Eastern countries.

This North West country cluster report analyses the results of the survey in four countries: **Denmark, Finland, Ireland and Sweden**. The information used to elaborate this report was collated by the following experts:

- Denmark Liv Baisner Petersen and Eva Sophia Myers¹
- Finland Suvi Heikkinen
- Ireland Eileen Drew
- Sweden Minna Salminen-Karlsson

For further details regarding the methodology followed to collect the information and elaborate this report, please refer to the Methodological Annex.

¹ The experts from Denmark are affiliated to SDU, an institution member of the INSPIRE consortium.



2 Legal and policy framework

2.1 Legal Framework

In two of the four countries, Sweden and Ireland, there have been no legal changes in gender equality in R&I since the actualisation of the GEAR tool (August/September 2021). In Denmark and Finland, there have been legal changes to overriding national laws (i.e., not explicitly for R&I) in this period in the form of amendments to existing laws, most of these on the basis of external developments, such as the EU parental directive implementation and the #metoo-movement which has impacted political debate. Others include updating grounds and means of discrimination and outdated requirements, such as medical proof of sterility in transgender persons. In Denmark, where gender equality is regulated as an overriding employment issue (for any sector), several amendments have been passed. Notably, the Gender Equality Act regarding strengthened protection of LGBTI-persons against discrimination, hate crimes and hate speech and persons with disabilities against hate speech (December 2021). This is accompanied by a corresponding amendment of the Act of Prohibition of Discrimination in the Labour Market. Moreover, the Gender Equality Act has been strengthened with targets and policies for gender composition of top management and boards in public institutions and public companies (May 2022). This was followed by a prohibition against employers' screening of job applicants based on their age (March 2022). The Equal Treatment Act has seen two material amendments in the period: Implementation of the 2019/1158 EU leave directive's provisions on carer's leave, redundancy protection, etc (June 2022) and implementation of the 'Tripartite Agreement on Initiatives to Combat Sexual Harassment at the Workplace' which extends the possibilities for sanctions (March 2022). The implementation of the EU parental leave directive also gave rise to one material amendment of the Maternity Leave Act (June 2022) along with two other amendments put into effect at the same time. First, the introduction of earmarked leave, equal distribution of the right to maternity allowance and the right to transfer maternity allowance to welfare parents, close family members and others. Second, a sharpening of the Danish state-funded employment sickness benefit supplement, such as a reduction of allowance period for eligible recipients, a reduction of the rate for non-supporters, as well as an introduction of a language requirement for non-Danish recipients.

In Finland, the transgender law was amended in April 2023, so that transgender individuals can legally change their gender by self-declaration without having to undergo a lengthy medical process which, under the previous law, included a psychiatric assessment. In addition, the amendment abolished the requirement that transgender people must be unable to reproduce, as the previous law required a medical certificate that the person was sterile for legal confirmation of their gender.

In terms of representation, Finland has a requirement that organisations that employ more than 25 people have explicit gender equality plans. However, gender equality in private companies and other organisations is primarily seen and treated as a question of *representation* in management and boards. In Denmark, this includes a sharpened requirement, laid down in the Equality Act and valid from January 2023, that public institutions and companies have and regularly report on explicit targets, policies and strategies for implementing equal gender distribution of management. In Finland, there is a requirement that at least 40% of planning



and decision-making bodies of state and municipalities must be made up of both men and women.

2.2 Policy Framework

Of the four countries, only Ireland has seen main changes in policy frameworks regarding gender equality in R&I, based on proposals and recommendations in the Higher Education Authority (HEA) 2022 Gender Equality Report: 2nd HEA National Review of Gender Equality in Irish Higher Education Institutions. This includes improving and advancing Gender Equality Plans (GEPs) in alignment with Horizon Europe requirements and Gender Action Plans (GAPs) in compliance with the Irish Athena SWAN framework. These areas key instruments for implementing change measures and documenting and monitoring impact and effect, improved and clear monitoring structure and progress tracking and evaluation at institutional as well as national levels, embedding capacity building and resource and workload allocation for staff responsible. Furthermore, intersectional approaches and actions focused on vulnerable groups have been more prominently embedded, and actions to implement consent framework and zero tolerance of sexual violence and harassment have been integrated. Ireland is also the only of the four countries to explicitly integrate and advance an intersectional approach likewise outlined in the 2022 HEA expert review. Here it is proposed that implementation of EDI strategies that centrally take an intersectional approach are given a timeframe of 3-4 years. The review explicitly recommends that, for this transition, EDI units be resourced with significant expertise, senior professional services and relevant research capacity specifically to provide advice and guidance on enacting intersectionality-focused measures, e.g., in relation to recruitment, promotion, organisational culture. Moreover, efforts to create intersectional interventions should involve broad-based coalitions of staff and students who will be duly recognised and compensated for their work. Also, to avoid a tendency to roll out initiatives on one equality ground after another.

Similarly, according to AdvanceHE, the new Athena Swan Ireland Framework (from the end of 2021) prompts institutional applicants to begin to build a foundation for more intersectional approaches through the collection of relevant data, narrative reflection and a requirement for priority areas in the action plan on intersectionality.

Overall, concerning **intersectionality**, it emerges that concerted policy efforts are most advanced in Ireland and even here it is still very much in its initial stages with focus primarily on building the foundation for the integrating intersecting grounds for discrimination into existing equality approaches. In all four countries, where focus is on mitigating discrimination these are still treated in isolation, and thus not in a way that takes adequate account of the implications of how these grounds *intersect*.

In terms of R&I policies that foster private companies and / or other R&I organisations to take gender into account in their R&I products or services, only Sweden has provisions in place in the form of a gender equality policy. This is the case in The Swedish Innovation Agency, which finances much of technological research and innovation for SME's as well as joint ventures between public research institutions and R&I-intensive companies. Moreover, The Swedish Agency for Economic and Regional Growth, which promotes sustainable growth and competitive companies, pays attention to the issue and has guidance on how to integrate a gender perspective. There is evidence of rising awareness and attention to these perspectives



in single sectors/industries. In Finland and Denmark, gender equality is primarily seen and treated as a question of *representation* in management and boards.

Prohibition of discrimination is in all four countries legally enshrined in non- or anti-discrimination acts and promoted in equality and equal treatment acts, as well as various employment-related acts, policies and agreements, such as, ombudsman acts in Sweden and Finland; Employment Equality and Pensions Acts in Ireland; work environment and occupational health and safety acts in Denmark and Finland; Tripartite agreements in Denmark, and a penal code prohibiting goods and service providers to discriminate in Sweden. All four countries have national bodies of ombudsmen and national human rights institutions. Cases are often handled by general or labour courts. These, however, are often subject to restrictive interpretation, usually to the disadvantage of claimants. Correspondingly, compensation is generally low. Thus, despite comprehensive legislation, law enforcement concerning discrimination is not as comprehensive, well-established nor efficient as the legislation warrants.

Table 1. Overview of protected characteristics

Protected characteristic	Denmark	Sweden	Finland	Ireland
Sex ²	x ³	x	x	
Gender ⁴	x ¹			x
Gender identity or gender expression ⁵	x ¹		x	
Transgender identity or expression		x		
Sexual orientation	x ⁶	x	x	x
Age	x ⁷	x	x	x
Origin			x	
Ethnicity	x ³	x		
Nationality	x ³		x	
Social origin	x ³			
Language			x	
Race	x ³			x
Skin Colour	x ³			
Religion	x ³	x	x	x
Belief	x ³	x	x	
Opinion	x ³		x	
Political activity			x	
Trade Union Activity			x	
Family status				x
Family relations			x	
Civil status				x

² Please note that the categories *sex*, *gender* and *gender identity/expression* are translated from the Danish, Swedish and Finnish that do not have equivalent terms for gender to the English, therefore they are listed here as reported by the national experts. They partly overlap or cover the same continuum consisting of (biological) sex, (cultural) gender and the more differentiated use of gender identity and/or gender expression (used in Sweden).

³ DA Stipulated in the Equality Act

⁴ See note 1, above

⁵ See note 1, above

⁶ DA Stipulated in both the Discrimination and Equality Act

⁷ DA Stipulated in the Discrimination Act



Health			x	
Disability	x ³	x	x	x
Membership of the Traveller Community				x
Any other personal grounds			x	

An overall assessment of the current national legal and policy framework situation in the four countries, in terms of their adequacy in fostering or sustaining significant advances in the field of inclusive gender equality in R&I, is given in Table 2, and, based on input from the four national experts, illustrates clearly that Ireland is at the forefront both with regard to legislation and practice and in terms of positive development, while Finland and Sweden demonstrate comprehensive positions. As shown in Table 2, Finland is in a stronger position with consistent positive development, whereas Sweden’s longstanding position in the forefront is under rising political threat. The standing in Denmark is markedly poorer than the other three, with less comprehensive action, less positive development than in the other three countries and significant public and political opposition.

Table 2 gives an overview of the four national experts’ overall assessment of their national situation.

Table 2. Assessment of national legal and political framework, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Denmark	Insufficient	Insufficient	Insufficient	Insufficient	Insufficient
Finland	Insufficient	Adequate	Insufficient	Adequate	Adequate
Ireland	Highly adequate	Highly adequate	Insufficient	Adequate	Highly adequate
Sweden	Adequate	Adequate	Insufficient	Insufficient	Insufficient



3 Structural Change

The socio-cultural, political and economic contexts of the four countries impact the institutionalisation of gender equality in R&I in different ways. All four countries have made significant advances, where Sweden and Finland have the longest and strongest track records, and Ireland has made the most impressive recent advances in terms of integrating an intersectional approach. A widespread self-conception of being highly advanced in terms of equality is prevalent in all four countries. In the three Scandinavian countries, there are persistent and rising anti-gender forces at play, which negatively impact the positive advances and potential for progress, while this seems to be qualitatively different in Ireland.

In the following, the situation for each of the four countries is detailed along with the most significant practical lessons from each context.

Denmark

Denmark is often seen as advanced in gender equality as the other Nordic countries. Historically, this is true; Denmark was among the first to implement the vote for women (1915) and was at the forefront of the feminist movement in the 1970's. Denmark is an advanced welfare state with long traditions of public free education, stable democratic institutions, solid, accessible and largely subsidised healthcare, maternity leave, day care, free tertiary education with financial stipends, high social capital and low degrees of corruption. However, decades of sweeping neoliberal reforms and successive waves of severe cutbacks on public spending have resulted in starved institutions, and this is beginning to seriously hurt processing, decision making and professional outcomes.

Regarding gender equality in general, Denmark increasingly lags behind her neighbours – presently occupying a 32nd place on the 2022 World Economic Forum Global Gender Gap Index, while Iceland, Finland, Norway, and Sweden are placed 1st, 2nd, 3rd, and 5th, respectively. Gender equality and especially sexual harassment are conceptualised as primarily work-related issues and, thus, placed in the work domain. Strong and explicit requirements do exist; however, awareness is low, and compliance is at best highly varied with hardly any sanction. A persistent lack of explicit focus, practice and accumulated institutional experiences with gender mainstreaming and systemic measures, leave a gap in the conceptualisation and practice of equality, diversity and inclusion measures (BCG, 2019). Moreover, Danish educational choice and labour market are highly gender-segregated (Danish Accreditation Institution, 2020).

Socio-culturally and politically, the self-conceptualisation is that Denmark is (still) at the forefront of gender equality, with a prevailing understanding of gender equality as a question of representation, and therefore quotas, which meets strong and vehement opposition partly because these challenge the ideal of meritocracy and a strong 'arm's length principle' towards the regulation of the labour market and individuals' choices. Approaches to gender equality are in the public domain and dominated by neosexist⁸, postfeminist⁹ standpoints – which filters

⁸ Neosexism holds that gender equality has been achieved and that sexism and gender-based discrimination does not exist

⁹ Postfeminism is a simultaneous celebration and disavowal of feminism



into Academia (Skewes et al., 2019, 2021) – with the consequence that attempts to bring gender equality and intersectional practices up to date and aligned with international practice are fragmented and lack consistent, continued, explicit support from the political top.

This, however, might be changing: the second #metoo wave in Denmark in the fall 2020 (sexismedu, 2021) seems to have reset codes of behaviour and ethics and addresses questions of power abuse, sex, gender, gender identity, sexuality, and (sexual) harassment. The public debate across the political spectrum is showing a shift towards general acceptance that there is a need to change the current gender imbalance, which poses a threat of loss of talent and market opportunities, and that a change can only be achieved through systematic efforts.

For gender equality in Danish R&I, the HEU GEP-eligibility criterion has boosted the implementation of concerted, systematic efforts on an unprecedented scale in RPOs and taking on the challenge of achieving equality. RPOs are increasing their systematic sex disaggregated data; orienting themselves to international practices; implementing measures to mitigate gender imbalance, improving equal access to resources and career progression; and mitigating bias in selection (UFM, 2022; McKinsey, 2018; DFIR, 2019). A rising demand from public and private R&I and HEI organisations seems to drive the development. This includes a shift in perspective from a sceptic view of EU policies to seeing these as forward-thinking and welcome levers for positive change.

Practical lessons learnt: In Denmark, sex-disaggregated data on the population of researchers and career and recruitment at Danish universities have been collected up till 2017 with irregular intervals. Also, data on resource and grant allocation was collected on an ad hoc basis, primarily for stand-alone analyses and reports with targeted foci. These were carried out by various funding organisations and research policymakers. These ad hoc reports have since 2013 been produced with higher frequency. In 2017, after a longer hiatus in the university reports, the Danish Agency for Higher Education and Science decided to publish sex-disaggregated data for the university sector annually; however, due to elections and other factors, this has in practice meant for [2017](#), [2018](#), [2019](#) and [2022](#). This is a significant step in the prevailing Danish gender equality environment, even if it is still not completely and unequivocally embedded, as the gap between 2019 and 2022 shows.

On the other hand, a matching and growing demand by the RPOs themselves for reliable and sector-wide data seems to keep the momentum – not least powered by the organisational data needs in relation to HEU GEP-eligibility criterion. This demand is increasingly being refined and coordinated across universities in a network for gender equality practitioners in the Danish University sector, GEAR:DK, established in 2017 as an outcome of the FP7-funded FESTA-project (implementation of gender equality for women in STEM) on the initiative of SDU (project partner in FESTA). The network has become established as a resource also to the Danish Rectors' Association 'Danish Universities' and has become consolidated as a functioning community of practice, not least in the context of implementing GEPs following HEU's requirements.



Sweden

For a long time, Sweden has been at the forefront in implementing gender equality, which has been a national pride (Having this as a national pride has not been unproblematic, though, as analysed in Martinsson, Griffin & Giritli Nygren, 2016). This gives a basic background to what is happening in gender equality in R&I today.

The political scene changed rapidly in autumn 2022, when a right-wing government, supported by the right-wing populist party Sverigedemokraterna (Sweden Democrats) came to power. Sweden Democrats have a conservative gender ideology and they have more power in the political scene than their position outside the government would imply. In particular, they oppose research about gender (Martinsson, 2022).

Basic institutionalisation of gender equality has been integrated into the higher education sector, and the current gender mainstreaming requirement for each higher education institution is in force through 2025 (Jämställdhetsmyndigheten, 2021). Some kind of gender equality officer exists in all universities. However, even if gender equality is seen as a separate issue from other diversity issues, many gender equality officers are responsible for the whole diversity area, without adequate resources. Hence, on one hand, the staff resource is often not adequate to work for structural change for gender equality and, on the other hand, there is the more precise policy requirement for gender mainstreaming which must be done, at least until 2025. Many of the gender equality officers work in HR departments, which restricts their vision of structural change.

The private sector in Sweden is in several aspects less interested in gender equality and diversity than many other countries in Europe. According to a survey by Sapio Research and Workday (<https://vdtidningen.se/svenska-foretag-pa-efterkalken-nar-det-galler-jamstalldhet-och-mangfald/>), fewer companies have a budget for equality measures and fewer people in leadership positions think that working towards gender equality is important.

The statement that more diversity, especially more women, increases productivity is a driver – it is not contradicted and efforts for gender equality are motivated by it. However, the commitment in companies to *structural change*, rather than trying to recruit more women, is still rare (Ingenjörsvetenskapsakademien 2021 is an example of that) However, there are a few examples, also showcased in specialist journals of companies, that have implemented structural changes¹⁰. These are seen as role models and pioneers, but this position also sets them apart from being seen as examples of normal course of business. Also, experiences discussed in female networks, in particular in male-dominated areas, show that there is still much work to do. Specialist journals and websites leave the impression that awareness of the problem is increasing, even if the first step to structural change is far from being completed.

Practical lessons learnt: Generally, the heavy engagement of the state and the requirements for gender equality actions by the Ministry of education (which also has research in its area of

¹⁰ Examples are:

- Sandvik, <https://www.home.sandvik/se/nyheter-och-media/nyheter/2017/03/insatser-for-okad-jamstalldhet-och-mangfald/>
- Höganäs AB <https://www.hoganas.com/sv/news-and-events/news/2019/hoganas-ab-pris-for-sitt-jamstalldhetsarbete/>
- Svevia, <https://www.svevia.se/projekt/innovation-utveckling/matning-av-machokultur/>



responsibility) are fundamental in keeping the issue on the agenda. The task of the Gender Equality Agency to monitor and provide support legitimises the work in single institutions (Sjöberg Forsberg, 2022; Jämställdhetsmyndigheten, 2023). In practice, this includes knowledge enhancement and joint meetings / trainings for higher education institutions, as one group, and for the main research funders together with a number of other state authorities)

An example of good practice, which shows the manifold actions that need to be taken, is the way the Swedish Research Council has worked with integrating gender in its processes of evaluation. Three pilot areas are described in Vetenskapsrådet, 2018. The initiative had several features: 1) establishing a working group; 2) analysing statistics on funding according to gender and according to the gender content in the proposal; 3) informing the applicants in several ways on the meaning of gender perspective in research content – the call, the Council's webpage, newsletters; 4) sending a survey to the applicants after proposal submission to elicit additional information on these issues; 5) training for all staff; 6) creating support material to all administrators who answer inquiries from applicants, in addition to asking them to forward all inquiries to the working group for their information; 7) in collaboration with the head administrator of each of the pilot areas, creating guiding texts, different for different scientific areas, in the handbooks that the peer reviewer evaluators use in evaluating proposals (the evaluators would have liked still more guidance on how to weigh the gender aspect in the evaluation); 8) amending proposal templates with a question whether gender perspective was relevant and why – with a reminder that if it was relevant the proposal itself should take it into account; 9) observing funding meetings to see how gender perspective was dealt with.

Another example of a practice that is a good start and can be improved is the Vinnväxt programme by the Swedish Innovation Agency (Jonasson Tolv & Lööf, 2021). In their work with three innovation hubs, which include public actors as well as private companies with male-dominated leadership, the Agency learnt that, in addition to clearly explaining the benefits of gender equality, as a funder they could: 1) make sure that equality issues are anchored at the highest level of the partaking organisations; 2) provide clear advice on who should be made responsible for gender equality at the implementation level; 3) provide detailed requirements of what the partaking organisations more exactly should do; 4) require reporting on equality measures in the same template as technical advances and financial outcome; 5) provide more information on the webpage and a contact person on equality issues; and 6) ensure research following the gender equality work.

Finland

Finland has for a long time enjoyed a strong position as a country with advanced gender equality, this may result in the assumption that gender equality has been achieved at work, and, therefore, gender equality is no longer a relevant question in Finnish R&I (Korvajärvi, 2021; Tanhua, 2022). Finnish society has a strong tradition of gender equality work and social welfare policies, and this affects both positively and negatively the institutionalisation of gender equality in different sectors. Finland has strong divisions of female and male-dominated sectors, and of these, R&I is still highly masculine. Even if the social norms and expectations around gender roles have evolved to become more inclusive (Lund et al., 2019), there are still gender equality problems and problems vary greatly regionally in terms of education, career progression, and gender division in leadership positions (Vehviläinen & Valaskivi, 2022; Tanhua, 2022).



In terms of political context, Finland can be characterised as having a strong commitment to gender equality, which is reflected in its national policies and legislation. The Finnish government has set targets and goals for gender equality in various sectors, but still, the assessment of the development and the consequences of unethical behaviour in ways adverse to equality are yet to be (fully) implemented. Furthermore, the government has implemented measures to promote gender equality in R&I, such as funding programs for women in STEM and a requirement of GEPs from research organisations for them to receive public funding.

Traditionally, Finland's economy has been highly dependent on innovation and technology, and the country has a strong focus on R&I. The government recognises the importance of diversity and gender equality in innovation and has taken steps to ensure that women are represented in R&I at the policy level, but the practice for the organisations and companies is still underdeveloped (Jousilahti et al., 2022). A lack of top management commitment and postfeminist thinking often results in the value of gender equality in R&I remaining invisible and unrecognised (Korvajärvi, 2021; Gabriele & Vehviläinen, 2021).

Practical lessons learnt: One example of good practice in Finland is the GEP implemented by the Academy of Finland, which provides funding for research projects. The GEP requires applicants to provide a gender analysis of their proposed research and to demonstrate how gender equality and non-discrimination will be promoted throughout the project (gender distribution, work-life balance, research careers etc). The Academy also provides training and support for researchers to develop gender-sensitive research practices. This has resulted in an increase in the number of women participating in research projects and an improvement in the quality of research. Moreover, ensuring an anonymous recruitment process is a measure that has been developed in some companies, and this has been detected to decrease biases and discrimination.

Ireland

Ireland has undergone a massive and urgent transformation towards gender equality in the 21st century. The groundwork lies in the previous decades with pressure building that was traditionally not matched by political commitment for gender equality. Education policy, that introduced free access to free secondary education (high school and equivalent) in the 1960s, was followed by massive take-up by women who have overtaken men in terms of educational attainment/qualifications. According to the official HEA statistics for 2019 (the latest published), the percentage of tertiary education graduates in Ireland is 50% for women and 31% for men. The comparable data for Sweden is 43% for women and 34% for men. Hence the take-up of tertiary education has benefited women in Ireland more than men, where the gap in attainment is 19% compared with 9% in Sweden (Data from <https://hea.ie/>).

Furthermore, entry to the EU required the enactment of the Employment Equality and Anti-Discrimination law, which abolished the existing 'marriage bar' and guaranteed equal access and equal pay for women.

Ireland has become an attractive place for external investment, particularly in ICT, and this created an economic boom and rising demand for labour (now increasingly from outside Ireland) thereby creating a growing demand for highly educated recruits.



Ireland has continued to liberalise on what had been controversial issues via its Citizens' Assembly, a body formed from the citizens of Ireland to deliberate on a number of issues which were referred to it by the Houses of the Oireachtas (<https://2016-2018.citizensassembly.ie/en/Resource-Area/FAQ/>). The Assembly provides a platform for a cross-section of the public to hear presentations from experts and civil society groups and to engage in rational and reasoned discussion, and to then make recommendations to the State on the options available. This led to reform of the Irish Constitution, following referenda on social issues: Divorce, Abortion, Gay Marriage and (most recently) Gender Equality. These reforms have contributed to the new social/political agenda in Ireland. Feminist lobbying, including the National Women's Council, was important in arriving at this outcome.

The instrumental role of the Higher Education Authority in supporting and funding a pilot phase for Athena SWAN in Irish HEIs has been vital, following the HEA Reports in (2016, 2018 and 2022). These have reinforced and institutionalised earlier developments and successes.

Practical lessons learnt: EU Projects were instrumental, which in combination with a positive political climate and national culture, including a long tradition for embedded participatory, expert-informed democratic processes have led to conducive processes and high degree of uptake of recommendations and facilitated the deep and wide realisation in HEIs that gender equality was not only compatible with, but essential to, competition/rankings.

A crucial momentum was the successful linking of HEI funding from the highest authority levels with Athena SWAN's gender equality targets and the alignment between the Athena SWAN incentives with a corresponding linking of funding to an institution's performance in addressing gender inequality.

In the following, a short review of recent relevant literature in the four countries is presented, followed by a presentation of advances for initiating and sustaining change along with main barriers and facilitating factors.

3.1 Literature Review

The relevant literature identified by the national experts in relation to structural change towards inclusive gender equality in R&I organisations is primarily focused on initiating and – especially – on sustaining and deepening change first and foremost within HEIs; secondly, in other public RPOs and RFOs and, finally, in private RPOs. The relative weight in the countries in these two topics (initiating vs. sustaining change) aligns with the legislative situation, described above. That is Ireland, Finland and Sweden have the most detailed, evidence-based research focusing on actions and concrete measures to redress the situation and, also, a relatively more detailed approach to gendered innovation, intersectionality and monitoring gender equality measures, whereas the Danish literature includes more grey reports on the current situation as well as the factors that impact the equality discourse in support of building an evidence and argumentation base.

Themes touched on in all four national contexts include sexism, masculinities, excellence, and meritocracy as ways to understand persistent inequalities, as well as the micro-dynamic 'doing' / 'undoing' gender – and how these impact structural practices and processes as well as the general equality discourse and public climate for structural change. As already mentioned,



however, there is a difference of where the main focus lies: 1) on aiming to *build* an evidence- and argument base (raise awareness) – and thus preparing or priming a ground for initiating change to a higher degree than sustaining and deepening (Denmark). Or 2), in contrast, on *cracking on with it*: In Sweden and Finland through evaluation of implemented practices and high(er) degrees of institutionalisation / mainstreaming, and in Ireland with systematic commitment, accountability and action. Evident in the selection from all four countries is concern regarding far-right politics, anti-gender and antifeminist discourse, neosexism, postfeminism, managerialism, and corporatism.

Also, in the selection from all four countries, specific relevant themes are elaborated, most notably gender representation, recruitment, allocation of tasks and academic housekeeping, training (here especially unconscious bias and management) and allocation of resources for gender equality work. In the Swedish, Finnish and Irish literature, the topics of gender pay gap and education and a constellation of the workforce to implement the changes are examined. Across the board, there is a general call for systemic and structural approaches that entail comprehensive, simultaneous and multipronged address as well as multi-level (micro-dynamic, day-to-day management, organisational, sectoral political, national and international) and cross-sectoral involvement. Notably, this demand is more detailed, specific, and research-based in the literature of Sweden, Finland, and Ireland compared to that of Denmark. The Swedish and Finnish articles deal most comprehensively with practices and promises of gender mainstreaming, whereas the Irish deal with the impact of involving RFOs centrally to promote the implementation, continual monitoring and accountability of GEPs and GAPs at both institutional and national levels. Finnish and Irish articles examine the merit of aligning national and EU gender strategies for positive policy development.

Sexism and gender-based violence as contributing factors in maintaining the persistent gender inequality are central themes in all four national contexts. A corresponding call for differential, systematic and structural approaches to remedy these are seen to be integral to any change effort.

Intersectionality receives only little attention, and where it does, it is most differentially addressed in Swedish and Finnish literature. Moreover, in these cases it is about including ethnicity and disability perspectives in equality and diversity work through a detailed examination of the consequences of not doing so.

Implementing gendered innovations across the R&I sector also receives little attention, the one Danish article cited is about integrating a gender dimension in educational programmes and teaching. There is more attention in the Swedish, Finnish and Irish selection, and also including other types of organisations than HEIs, with a focus on cross-sectoral correspondences and alignment.

Monitoring gender equality is treated with a more detailed and differentiated, evidence-based focus in the Swedish, Finnish and Irish literature. Moreover, in Ireland there is a marked emphasis on state, multi-state and international-level monitoring. However, it is not completely clear whether this covers *inclusive* gender equality, and if so, which kind of inclusion is meant.

In summary, the North-West European country cluster has the most recent literature, in the form of reports and research analyses, on the topics in following order: most on sustaining



change, next on initiating change and monitoring, and finally on gendered innovation in R&I and intersectional approaches. As for type of organisations, the focus is primarily on HEIs, followed by (other) public RPOs, then RFOs and, finally, private RPOs. There is no attention to NGOs and other non-profit RPOs. These tendencies are summed up in table 3 (numbers refer to listed national literature, provided in the references):

Table 3. Selected literature by country, topic and type of R&I organisation					
Topic	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Initiating change	DK4 FI5 IE1 IE3	DK1 DK3 DK4 DK5 FI1	FI2 FI5 IE1 IE2 IE3	DK1 DK4 SE10 FI1 FI2 FI5	DK1 DK2 DK4 SE10 FI2
Sustaining and deepening change	DK4 SE4 SE12 FI5 FI6 IE1 IE3 IE4 IE7 IE8 IE9	DK1 DK3 DK4 DK5 DK6 DK7 DK8 SE1 SE2 SE3 SE4 SE5 SE6 SE7 SE8 SE9 SE11	SE12 FI1 FI2 FI3 FI4 FI5 FI6 FI7 IE1 IE2 IE3 IE4 IE5 IE6 IE8 IE9	DK1 DK4 DK6 DK7 DK8 SE4 SE10 SE12 FI1 FI2 FI5 FI6 IE9	DK1 DK2 DK4 SE4 SE10 FI2 FI6
Adopting an intersectional approach	FI5	SE5 FI1 FI4 FI5 IE10	FI5	FI1	
Implementing gendered innovations	SE13 SE14 FI5	DK3 SE2 SE3 SE5 SE9	SE13 SE14 FI2 FI5	SE13 SE14 FI2 FI5	SE14 FI2
Monitoring inclusive gender equality	SE12 FI5 IE3 IE8 IE9	SE2 SE3 SE5 SE12 FI5	IE1 IE2 IE3 IE8 IE9	SE12 FI5 IE9	

The degree of sufficiency of the current knowledge base on structural change towards (inclusive) gender equality in R&I organisations for each of the five topics in the four countries is assessed by the national experts as outlined in the following table.


Table 4. Assessment of current knowledge in the country, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Denmark	Insufficient	Insufficient	Insufficient	Insufficient	Insufficient
Finland	Insufficient	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Ireland	Highly adequate	Highly adequate	Insufficient	Highly adequate	Highly adequate
Sweden	Highly adequate	Highly adequate	Insufficient	Insufficient	Highly adequate

This assessment is in general aligned with the findings of the literature review and also with the legislative and policy framework situation, see section 2 above.

3.2 Initiating change

The general degree of uptake of GEPs in the four countries is most pronounced in HEIs, most likely a result of the Horizon EU GEP-eligibility criterion. Of the four countries, Sweden has the most widespread and well-established use of GEPs or alternative instruments, a consequence of Sweden's long practice of gender mainstreaming. Also here, Ireland and Finland are well established in terms of GEP uptake, whereas Denmark clearly shows up as a national newcomer to working systematically with GE. A collected overview of the prevalence of GEPs in the five different types of organisations is given in Table 4.

Table 5. Degree of uptake of GEPs by type of R&I organisation

Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Denmark	Some have GEPs	Most or many have GEPs	Some have GEPs	Some have GEPs	n.a.
Finland	Some have GEPs	Some have GEPs	Some have GEPs	A few or none have GEPs	A few or none have GEPs
Ireland	Some have GEPs	Most or many have GEPs	Most or many have GEPs	n.a.	Some have GEPs
Sweden	Most or many have GEPs	Most or many have GEPs	Most or many have GEPs	Most or many have GEPs	n.a.

This general development is also reflected in the five types of organisations in which the national experts consider to be relative newcomers regarding implementing GEPs. In Sweden, systematic gender equality instruments such as GEPs are well-established in all but NGOs, and there is accessible knowledge at hand. For Swedish NGOs, GEPs have not necessarily been seen as 'their' instrument for GE, and in contrast to larger public and private employers, NGOs have not seen the legal GEP requirement to be applicable to them. Finland shows the same situation for RFOs, HEIs, and other public RPOs, with well-established GEP practices. Private RPOs are seen as relative newcomers and, therefore, there is as of yet not widespread systematic planning and execution of GEPs. For NGOs there is -to the expert's knowledge- no



reliable information available. In Ireland, only HEIs have a well-established practice, whereas RFOs, other public RPOs and NGOs are assessed as relative newcomers since their GEPs – while in existence and with information about them accessible – are mostly from 2020 onwards. For private RPOs, there is - to the expert's knowledge - no reliable information available.

Newcomers in relation to implementing GEPs

In Denmark, both HEIs and RFOs are seen as relative newcomers and, for all other three types of organisations, there is - to the expert's knowledge - no reliable information available. This very clearly reflects Denmark's relative *general* newcomer situation to systematic gender equality instruments, in comparison with country cluster neighbours. This is perceived to be due to the widespread consensus, not least in the public debate, that Denmark is a frontrunner, and that affirmative action and quotas are counterproductive, which has resulted in hands-off legislation, letting it be up to individual institutions to define and implement measures and objectives, while obscuring systematic data and information. The implementation of the HEU GEP eligibility criterion came as a relative shock to most Danish R&I organisations.

Table 6. Type of organisations as 'newcomer' implementing GEPs					
Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Denmark	Yes	Yes	n.a.	n.a.	n.a.
Finland	No	No	No	Yes	n.a.
Ireland	Yes	No	Yes	n.a.	Yes
Sweden	No	No	No	No	Yes

The use of alternative instruments to GEPs is only found in Sweden, for RFOs with policy documents on gender equality in the distribution of funds and for HEIs where gender mainstreaming plans have replaced the former legal GEP requirement. This can be seen as a result of the longstanding and consistently developed practice of systematic and institutional gender equality work in Sweden. For the other three countries, where there is (reliable) information available, alternative instruments are not widespread.

Table 7. Use of alternative instruments to GEPs					
Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Denmark	No	No	No	No	No
Finland	No	No	No	n.a.	n.a.
Ireland	No	No	No	No	No
Sweden	Yes	Yes	No	n.a.	n.a.



Main barriers and facilitators for initiating change

Barriers and facilitators for initiating change vary in the four countries, being closely linked with prevailing national situations, history, as well as the general public discourse. Thus, in Denmark, the publicly vocalised neosexist and postfeminist standpoints combine with a widespread understanding that gender equality equals quotas and affirmative action, the lack of systematic data and knowledge, and a general absence of experts to make a strong *general* barrier to initiating change for gender equality. In terms of facilitators, EU and national legal requirements are important, as are international and sector-wise competition and demonstrable positive effects of implemented measures. Other facilitating factors are the recent (2020) #metoo movement and other bottom-up demands such as employees' demands for parental leave. Finally, possibly as a consequence of the Danish hands-off approach, leaving it up to single institutions to implement gender equality measures, the support and endorsement of top management is crucial. These factors apply to all five types of organisations.

Sweden, in contrast, has generally moved beyond the initiating stage, and therefore resistance or barriers are more localised and not as sweeping as in Denmark. Thus, barriers are to be found in traditionally male-dominated fields and sectors – such as traditional Swedish base industries (mining, steel, wood and machines) and the IT sector with its brand of masculine culture – where lack of understanding of the problem and resistance may be found, as well as in political NGOs, whose ideology - or that of their financiers - as in favour or opposition of gender equality may play a decisive part. Here the rising anti-feminist public discourse may also play a larger role than in the other types of organisations. Also, NGOs and other non-profit RPOs may have an understanding that gender equality requirements do not apply to them, making it more crucial how leadership and staff engage with and around questions concerning GE. For NGOs that research social/societal questions, gender equality is often a given, whereas for NGOs to the right of the political spectrum that research economy and innovation, gender equality may be positive as the idea of the importance of using the female talent reserve is strong in Sweden. General facilitating factors include a generally positive societal discourse concerning equality and requirements from governments. For RFOs, the discourse concerning the loss of female talents is also a factor. For public and private RPOs, female networks and supportive top management are important, as are requirements from funders.

In Finland, the situation is also differentiated, reflecting the relatively advanced stage of gender equality implementation: For RFOs, barriers include unsupportive top management and the absence of gender equality experts, and facilitators include a strong gender equality movement and EU pressure. For HEIs, the main barriers count uncommitted top management, general resistance towards gender equality and lack of gender audit. Facilitating factors include strong pressure from the ministries that fund HEIs and the presence of GE experts. For other public RPOs, the main barriers include unsupportive top management and the absence of gender equality experts, and facilitating factors involve strong gender equality movements and stakeholder pressure towards GE. For private RPOs, barriers include inadequate expertise and lack of motivation – the latter also applies to NGOs and other non-profit RPOs –, along with weak engagement and a lack of perceived importance regarding GE. For both types of organisations, facilitating factors include stakeholder pressure towards gender equality and a strong legal framework.



Ireland, with its singular success in defining, raising awareness and implementing systematic measures and instruments at all organisational and political levels positions the main barrier across all five types of organisations to be lack of recurrent funding and the main facilitating factor to be national policy framework.

3.3 Sustaining Change

As described in detail above, sustained change is well advanced in the North West country cluster, especially in Finland, Sweden and Ireland.

Main barriers and facilitators for sustaining change

In terms of sustaining change, the main barriers and facilitators extend what we see in terms of *initiating* change. In the most advanced countries, especially Sweden and Finland, more differentiated and specific barriers and facilitators across the types of organisations could be identified. Although, it may be argued that differences in reporting are due to personal observations and the style of the national experts. Nonetheless, there is reason to believe that the detailed Swedish responses would also be partially or wholly applicable in other national contexts.

In Denmark, in addition to those mentioned in the previous section, barriers to sustaining change across all five types of organisation include the non-existent policy framework for the R&I sector, a general absence of gender equality experts, lack of systematic data and knowledge, weak gender equality movements, as well as in-house resistance both from top-management and from structures and procedures. Facilitating factors are the same as for initiating change, but here the beginning of a positive development in gender equality awareness, expertise and capacity base is promising.

In Sweden, barriers to sustaining change in RFOs include academic ideals and traditions forming biases – both conscious and unconscious – that appear in the peer review process when evaluating applications. This presents difficulties in counteracting the effects of inequalities in women's and men's academic careers, as funding decisions need to be gender-neutral. Facilitating factors include an awareness in several funding organisations and a will to do something about the problem, such as observation of funding decision meetings; efforts to evaluate postdoc mobility demands in different ways and continuous monitoring of gender distribution of funding. It is also a facilitating factor that public financiers have an obligation to consider gender equality in their funding decisions. For HEIs, barriers consist of gender fatigue and an increasingly polarised public discourse and resistance to gender equality becoming more outspoken. Changes of key persons always constitute a potential threat. Finally, more and more stable funding is required. The continuous requirements from the relevant ministry, e.g., Gender mainstreaming and gender distribution among professors, is a main facilitator for HEIs along with support for gender mainstreaming both in terms of funds but also – and more crucially – by the organisation of network events and meetings, handled by the Swedish Gender Equality Agency. For other public RPOs, the fact that gender equality may not be a focus area constitutes a barrier. This produces a dependence on the interest and mobilisation of individuals in key positions, such as leaders, even more critical with a lack of stability and continuity as a potential consequence. Counteracting facilitators include the prevailing tradition



of gender equality plans and the Horizon EU GEP requirement. For private RPOs, dependence on the interest and mobilisation of single persons in key positions such as leaders is also a critical barrier. In Sweden, however, gender equality is (still) politically correct, especially as the importance of not losing female talent is stressed by several industrial R&I organisations. This is a facilitating factor. As it is the number of women in leadership roles. For NGOs and other non-profit RPOs, the situation is similar to the private R&I organisations, taking account of what was listed in the section above on initiating change. Where dependence on single persons' interests and mobilisation are one of the main driving factors, this may prove to be a barrier when people change or interests shift. Conversely, if there is an ideological basis in favour of gender equality, this may facilitate a sustained focus on change and there may not be as strong a susceptibility or dependence on prevailing interests, agendas or ability to mobilise.

In Finland, the strongest barriers to sustaining change towards gender equality are a lack of commitment from top management and the postfeminist belief that gender equality is achieved already, resulting in resistance and a lack of acknowledgement of the current relevance of GE. This is the same for all types of organisations except, NGOs and other non-profit RPOs, where lack of resources and expertise on gender equality work constitute the main barriers to sustaining change work. Facilitating factors are more differentiated: for RFOs and public RPOs facilitating factors include EU-legislation and the existence and promotion of positive examples, as well as the strong policy framework and incentives for promoting GE. For HEIs, it is a strong facilitator when funders undertake thorough evaluation and assessment of GE work and progress. For private RPOs, the strongest facilitator is building a business case and finding new ways to promote GE. For NGOs and other non-profit RPOs, working with gender audits facilitates sustained change.

Main stakeholders for and against structural change

The experts cite the following important stakeholders for and against structural change towards inclusive gender equality in R&I organisations in the four countries:

In Denmark, policymakers and anti-feminist mobilisation have been identified as the main opponents of change, while feminist social movements and international collaborators as the main proponents, across all five types of organisations.

In Sweden, internal positive GE ambassadors, such as GE officers, management, students, and staff at different levels are the main supporters of structural change. For private RPOs, female networks in and between companies also work positively for structural change. Important stakeholders *for* structural change for HEIs are the Ministry of Education and Research and the Swedish Gender Equality Agency, which supports and monitors changes. Stakeholders against structural change include mainly external actors, largely those who express their dissatisfaction about the 'contamination' of research by gender equality considerations in the media. Specific opponents to structural change in RFOs count peer reviewers used in the evaluation processes and some private funders may also have internal resistance. For NGOs and other non-profit RPOs, leadership support may vary according to their or their customers' ideological standpoints.



In Finland, policymakers and gender practitioners are the main supporters of structural change across all types of organisations. For RFOs and public RPOs, gender researchers are particularly important as are gender enthusiasts in general for HEIs (in addition to students) and for NGOs and other non-profit RPOs. Main opponents are top and middle management across all five types of organisations as well as employees and administrative staff especially concerning private RPOs, male professors at HEIs and social anti-gender movements for NGOs and other non-profit RPOs.

In Ireland, the following highly influential stakeholders were identified as supporters of change: The Centres for Women's /Gender Studies in Irish HEIs, from 1990 onwards; The Trinity Centre for Gender Equality and Leadership, TCGEL from 2017, which facilitated individual and institutional pressure and lobbying; moreover, three EU FP7 projects were identified as catalysers of change: INTEGER in Trinity College Dublin (TCD), FESTA in University of Limerick (UL) and GENOVATE in University College Cork (UCC). For RFOs, especially the Higher Education Authority (HEA) in underwriting government commitment to Athena SWAN to support and require HEIs to obtain Athena SWAN awards since 2013 and the fact that the political climate is very supportive of gender equality, intersectional perspectives of equality and LGBTQ+ groups. These are specific and very conducive examples of facilitating actors for the singular development in Ireland. As stakeholders against structural change, ageing male professors and women in 'gatekeeper' roles were identified and a lack of recurrent and targeted funding for gender equality / EDI is a main barrier. These can be seen to be both, specific for the Irish case and also general for all contexts.

3.4 Intersectionality

In general, and also evident in this country cluster, intersectionality as an applied discipline is still in the early stages of development with knowledge, methodology, understanding and practical application at the very initial stages. There are signs that there is a necessity for a more differentiated approach to gender and other grounds for discrimination, as well as where these intersect. However, there is still a huge gap between this burgeoning recognition among policymakers and some leaders to the actual application and widespread practice. The knowledge is still scarce, and good practice examples are far too few and not yet convincing. One problem (some places used as an excuse) is connected to dilemmas in obtaining, storing and using relevant data.

Of the four countries, Ireland has the most explicit, systematised, implemented and executed approach to intersectionality in the academic sector, yet even here, this is only at the initial stage with a largely additive approach, but with a defined objective of laying the foundation for a more integrated and truly intersectional approach. Ireland has made significant advances in addressing race as one intersecting categorisation with potentially big implications for organisational change, promising practices for data collection and integrating the communities in question as expert stakeholders in defining questions and (organisational) responses.

While not as explicit, defined and sector-specific as in Ireland, Sweden and Finland have longstanding practices of detailed application of non-discrimination measures, however, intersectionality is still largely seen as a question of discrimination and thus treated as a matter of equal opportunity and, even if equal opportunities consultants / officers at universities -in for instance Sweden-, have long been coordinating their work, it is as of yet not wholly integrated



with gender mainstreaming and not anywhere close to a fully integrated understanding of the organisational and structural (change) implications of equality work. Where practiced, it is still only restricted to one ground for discrimination in combination with gender, and not as more categorisations intersect. Finland is in general still a distinctly homogenous society, and the value of an intersectional approach is not understood widely or comprehensively. Denmark, in alignment with its general regard for equality issues, lags well behind the other three countries in this area and has barely begun to consider how equality dimensions intersect.

Main barriers and facilitators for adopting an intersectional approach

Across the four countries, the largest cited common barrier to adopting an intersectional approach is lack of knowledge, data, terminology, expertise and resources for understanding intersectionality in practical terms.

In Denmark, in addition to those mentioned in the previous two sections, barriers to adopting an intersectional approach across all five types of organisations include a general reluctance and insecurity about how to address intersectionality without unintended implications. Likewise for facilitating factors: in addition to the ones mentioned in the previous two sections, positive practical examples are essential.

In Sweden, the main barriers across the five types of organisations are lack of knowledge or interest and lack of a societal discussion and demand to spark interest. For HEIs, there is somewhat more knowledge. Facilitating factors include researchers who do relevant societal research, especially where this research is on grounds for discrimination including gender in the institutions who may in turn increase knowledge and awareness. This applies especially to HEIs and public RPOs. For RFOs facilitating factors are all but non-existent. Potential such factors could be influential people with an interest in and knowledge about intersectional approaches. One example of an initial change is the largest public funders, FORTE (which funds health, welfare and working life), which includes gender in the evaluation of research proposals that deal with age, ethnicity and ability. For private RPOs, NGOs and other non-profit RPOs, support for social innovation may prove to facilitate spreading of the intersectional approach, by increasing awareness of the user perspective and thereby the insight that users are different.

In Finland, apart from lack of expertise and resources for understanding intersectionality, a barrier is that intersectional gender equality movements have not (yet) attained visibility and strength to boost urgency and knowledge. This applies across all types of organisations. The main facilitating factors are inclusive organisational cultures and, for RFOs and HEIs, diversity policies and specific measures to integrate gender and other equality policies – such as gender with first age, and then ethnic background, in order to attract immigrant workforce – are promising practices.

In Ireland, the main barriers across the five types of organisations include lack of intersectional data, terminology and recurrent funding. The main facilitators are the national policy framework.



3.5 Gendered innovations

This aspect addresses whether there has been any relevant advance regarding gendered innovations in the R&I private companies. Gendered innovations, however, is still a largely underexposed concept, and is still in several instances understood primarily as a matter of promoting an increased gender-balanced participation in the private sector and innovative and technological disciplines and enterprises. In Finland, under this heading, initiatives were found that address gender representation to counter discipline-specific homosociality in recruitment, career progression and increase gender balance; moreover, some initiatives adopt gender-sensitive and inclusive practices in R&D and innovation processes, as a way to improve technology through diversity, inclusion and equality, however, this mainly address a perspective of *who* is involved in research and innovation activities, rather than *what and how*. Examples are company-sponsored initiatives and programmes for inducting and raising interest among women and girls in IT, programming and gaming industries. Several good examples from Finland are listed: Girls in Tech, Mimmit Koodaa programme organised by Software Finland, and the non-profit organisation We in Games Finland.

In the same vein, in Ireland the '30% Club' initiative and similar private sector initiatives that seek via targets to increase women on boards of companies and in positions of decision-making (hence the name – 30%) were identified. Furthermore, Maynooth University EDI initiatives seek to build alliances between HEI and private companies with a view to promote gender equality, diversity and inclusion. A promising advance, driven by government requirement, is for companies to declare their gender pay gap.

A second understanding of this topic more in alignment with the definition of *gendered innovations* and *sex and gender analysis*, namely the integration of gender (and other equality) dimension into the research and innovation activities themselves, results in other types of initiatives and measures. In Sweden, the most advanced practices and policy development were identified, but as there is no overall information about actual advancements in the gendering of innovations in single companies, it is difficult to know if these policies have been implemented in practice. The traditional Swedish base industries, mining, steel and wood, are complemented by health technologies where gender perspectives are vital. The collaboration organisation for Swedish medical R&I companies (Lif) has some positioning documents on gender on their homepage. Also, the strategic innovation program, in medical technology, Medtech4Health, supported by Vinnova (Swedish Innovation agency), pays attention to the importance of equality in creating medical technology, and has published a handbook on how to integrate gender in medical technology. How much of this actually spreads to activities of the partaking companies is hard to say. Vinnova's program "Challenge driven innovation", with several different projects in collaboration with public research institutions and private industries, is an example of promoting gender aspects, but an evaluation by Ramboll finds that much could be improved. Vinnova is also the driver when it comes to SME's: getting funding from their specific investment in SMEs (enterprise cheques), requires that possible gender aspects in innovation are considered. There is evidence of growing awareness of the importance of these aspects: for example, 60% of the proposals that Vinnova received in 2022 acknowledged that gender was relevant in their area, however, gender aspects are often not dealt with in the practical work. In summary, awareness is rising in different institutions and organisations, but practice is lagging well behind.



In Denmark, gendered innovations in the private R&I sector are deemed to be largely non-existent, unless the company deals explicitly or exclusively with biological sex and gender topics, for instance, GynZone which specialises in developing and delivering evidence-based e-learning for obstetric specialist professionals and care-personnel. However, there might be a beginning trend to integrate sex- and gender analysis: Lego launched a no-pink theme series 'Women of NASA' to promote a wider range of role models in 2017. In general, gender equality is in a Danish context mainly addressed as questions of representation, gender balance, and mitigation of bias in selection, evaluation and decision-making procedures. RFOs, which are important drivers in setting agendas in both the public and private R&I sector, have primarily been preoccupied with fixing numbers and secondarily with shifting culture regarding excellence criteria to be more inclusive, embracing evaluation procedures to match. Awareness of what gendered innovation entails is only at the very initial stage, with maybe the very first concerted enquiries in this regard in a conference, hosted by Danish Universities, on 'Gender Dimension in Research'. The conference took place at the time of writing this report, integrating the gender dimension in research was addressed with examples of projects that apply gender and sex analysis, such as Health Science, some AI projects, digital historical cultural heritage exhibitions and a science innovation incubator that funds biomedical enterprises and which currently is undertaking a systematic mapping of the (non-)existence of research projects that integrate the gender dimension (n) or address issues related to female biology issues. The conference addressed the consequences of the lack of attention to GE in innovation with an open discussion of the possibility of taking this perspective between major Danish public and private funders, however, it was evident at this conference that a detailed and widespread understanding of gendered innovations is still a thing of the future – and this also goes for the top levels of public and private funders.

Overall, the twofold interpretation of the underlying question of what *gendered innovation* along with *sex and gender analysis* for this section therefore seems symptomatic: gender and equality are still seen to be primarily a question of the workforce, representation, access and opportunity. Thus, the specific examples given for the Finnish and Irish contexts have counterparts in other countries and are fairly widespread.

In contrast, a precise, differentiated and applicable understanding and knowledge base about what gendered innovation is and entails is still a matter for education, awareness raising and capacity building, and there is, therefore, widespread confusion about what is meant by 'gendered innovation'. Reflecting this – and symptomatic – is a general lack of systematic advancement in implementing, reporting and documenting gendered innovation initiatives and practices in the private sector, RFOs and HEIs.

3.6 Data monitoring

The data collection and monitoring of gender equality is a crucial aspect for understanding progress and for identifying potential facilitators and barriers. All four countries collect data, but Ireland and Sweden have the most longstanding and comprehensive collection as well as monitoring practices. Ireland's exacting Athena SWAN requirements ensure cross-institutional benchmarking. Since 2020, Ireland also systematically requires race/ethnicity data. And Sweden has a long history of similar if not quite as exacting practices and cross-institutional benchmarking, also in terms of data concerning other grounds for discrimination. However, a



new (heavily criticised) national ethical vetting of research projects discourages collecting data on disability, ethnicity etc. – also in research related to R&I organisations.

In Finland and Denmark, the focus is mainly on a collection of gender data in connection with GEPs – and here, Finland has a much longer history than Denmark. But this is without much national systematicity and virtually no requirement or practice of follow-up, analysis or evaluation. Neither Finland nor Denmark include data on other social categorisations in their data collection or statistics.

In addition, Sweden, Finland and Denmark cite additional ad hoc analyses performed at the national level, such as the 2021 National Swedish Survey on Gender-Based Violence and harassment in Academia, Statistics produced by Statistics Finland and specific issues enlightened through one-off analyses produced by Danish funding agencies, such as gender aspects of funding, gendered aspects of career progression etc. These one-off studies and analyses, however, do not facilitate systematic benchmarking or progressive tracking of development.

4 R&I Organisations

R&I organisations are in general well represented in the four countries, reflecting the high prioritisation and funding of research, innovation, technology and development in this country cluster. All four countries have extensive public higher education sectors, covering comprehensive and mono-discipline universities and colleges, art schools and technical universities, all state-funded.

Country	# HEIs	# Public RPOs	# R&I companies (estimation)
Denmark	38	140	n/a
Sweden	57	25	3.000
Finland	38	44	7.038
Ireland	18	23	n/a

5 Engaged stakeholders

Regarding stakeholder interest in the five topics, there is generally a high level of interest and engagement across the board, with national specificities concerning advancement and level of development and differentiation. Thus, Denmark has a general interest in initiating and sustaining change as well as in monitoring, particularly for RFOs and RPOs. Sweden's primary emphasis is on sustaining change with monitoring coming second, Finland with initiating and sustaining change and Ireland displaying all-round interest across the board. Interest and engagement in the topics of gendered innovation and adopting an intersectional approach do figure, but more sporadically.



Specialised consultancies for all topics exist in Sweden, Finland and Ireland, whereas Denmark only identified specialised consultancies for initiating and sustaining change and adopting an intersectional approach.

5.1 Policymakers

Policymakers in the northwest country cluster indicate a solid interest in initiating and sustaining change, followed by monitoring, and last by gendered innovation and intersectional approaches. Ireland and Finland have the most consistent across all five topics, in Sweden the focus is on sustaining change and only little interest in initiating change, gendered innovation and monitoring and no interest at all in adopting intersectional approaches. Denmark, on the other hand, presents more interest in monitoring and some in an intersectional approach.

Table 9. Overview of policy makers' indication of interest

Policy makers	Initiating change	Sustaining and Deepening Change	Adopting an Intersectional Approach	Gendered Innovations	Monitoring Inclusive Gender Equality
Denmark (n=3)	2	2	1	1	3
Sweden (n=3)	1	3	-	1	1
Finland (n=3)	3	3	2	2	2
Ireland (n=1)	1	1	1	1	1
Total (n=10)	7	9	4	5	7

Note: N and n indicate the number of policy makers identified. Policy makers can be interested in more than one topic. Numbers by topic indicate the number of identified policy makers interested in this topic.

5.2 Research Funding Organisations

Danish RFOs are mainly interested in initiating and sustaining change and in monitoring supplemented with one stakeholder's interest in adopting an intersectional approach. This picture is almost identical to the Finnish RFO interest, but instead of intersectionality interest, one stakeholder shows interest in gendered innovations. Swedish and Irish RFOs are primarily interested in monitoring, with the Swedish RFOs also showing interest in gendered innovations and sustaining change and least in intersectional approaches and initiating change. Only one Irish RFO is interested across the board.

Table 10. Overview of RFO's indication of interest

RFOs	Initiating Change	Sustaining and Deepening Change	Adopting an Intersectional Approach	Gendered Innovations	Monitoring Inclusive Gender Equality
Denmark (n=3)	3	3	1	-	3
Sweden (n=3)	1	2	1	2	2
Finland (n=3)	3	3	-	1	2
Ireland (n=3)	1	1	1	1	3
Total (n=12)	8	9	3	4	10



Note: N and n indicate the number of RFOs identified. RFOs can be interested in more than one topic. Numbers by topic indicate the number of identified RFOs interested in this topic.

5.3 Research Performing Organisations

For RPOs, Danish and Irish RPOs indicate interest in all five topics, but this may not necessarily reflect that they are equally proficient in all areas. In Ireland, this also reflects proficiency and practical advancement, whereas in Denmark this reflects RPOs' recognition that all areas are relevant to inclusive gender equality efforts, even if the level of practical implementation is yet not developed. Sweden and Finland show more differentiated approaches, where the Swedish RPOs emphasise sustaining change and monitoring inclusive GE, and the Finnish RPOs emphasise initiating and sustaining change as well as gendered innovations.

Table 11. Overview of RPO's indication of interest

RPOs	Initiating Change	Sustaining and Deepening Change	Adopting an Intersectional Approach	Gendered Innovations	Monitoring Inclusive Gender Equality
Denmark (n=2)	2	2	2	2	2
Sweden (n=3)	1	3	1	1	3
Finland (n=3)	2	2	1	2	1
Ireland (n=3)	3	3	3	3	3
Total (n=11)	8	10	7	8	9

Note: N and n indicate the number of RPOs identified. RPOs can be interested in more than one topic. Numbers by topic indicate the number of identified RPOs interested in this topic.

5.4 Communities of Practice

The four countries have highly engaged existing networks and / or associations, some of which are centrally placed and affiliated with strong organisations with a considerable reach of influence. These indicate interest and engagement across all five topics, with an overall emphasis on sustaining and initiating change and somewhat less on the other three topics.

Table 12. Overview of existing networks' and/or associations' indication of interest

Networks and/or associations	Initiating Change	Sustaining and Deepening Change	Adopting an Intersectional Approach	Gendered Innovations	Monitoring Inclusive Gender Equality
DK (n=3)	3	3	2	2	2
SE (n=3)	1	3	1	-	1
FI (n=3)	3	2	1	2	1
IE (n=1*)	1	1	1	1	1
Total (n=10)	8	9	5	5	5



Note: N and n indicate the number of existing networks and/or associations identified. Networks and associations can be interested in more than one topic. Numbers by topic indicate the number of identified CoPs interested in this topic.

** Ireland has indicated two additional influential associations that have contributed to driving and supporting the national gender equality agenda, however, these extend beyond what can easily be termed CoPs, and therefore indications of interest in these two have been omitted.*

Suggestions to support Communities of Practice

The national experts indicate two types of suggestions: potential or existing CoPs that may benefit from targeted support and themes that may enhance and build capacity in these CoPs. Regarding CoPs that may benefit, the Swedish, Finnish and Irish responses indicate only national CoPs, some existing and well-established GE practitioner and women's or feminist associations, e.g., student organisations (Sweden, Ireland, Finland); some existing networks that from the outset do not have gender equality as a theme, e.g., funding and innovation officers' associations (Sweden); some potential CoPs that could boost the ongoing efforts, such as a CoP in the forestry industry (Sweden); subgroups to existing GE practitioner networks around specific themes (Sweden, Ireland); or networks for men to become engaged in gender equality work (Finland); and networks around specific themes, e.g., practising intersectionality through integrating immigrant women; multidisciplinary work to enhance gendered innovations across different fields, and monitoring and assessment.

The Danish response, in contrast, includes both national and transnational CoPs, such as prior project consortia, or potential Scandinavian / Nordic gender equality practitioner network. Here, however, suggestions for themes are not further specified.

Themes suggested by the Swedish national expert are very specific, except for initiating change (as this is already well underway in most areas), matching differentiated needs and pairing with specific ideas for networks that may benefit. For sustaining and deepening change, this includes Gender in forestry, where ongoing and longstanding efforts so far still show meagre results. Potential CoPs could be representatives of the forestry companies with the support of the Swedish University of Agricultural Sciences. For adopting an intersectional approach, this includes intersectionality and gender+ in IT education – and here the targeted CoPs could be existing female students' associations that are an active and important factor in diversifying IT education and collaborate closely with (and are often financially supported by) their universities. The theme could be enhanced by broadening their experience of being a minority to include an increased understanding of other minorities' experiences. For gendered innovations, the theme could be to encourage increased knowledge and engagement of university innovation and funding support offices – targeting existing associations that are not organised around GE. Monitoring inclusive gender equality could be a follow-up or supplement to staff recruitment to include gender+ - and this could target for instance a subgroup of the existing Swedish HEI EDI officers who work intensively with recruitment.

The Finnish national expert proposes the themes of motivation and reasoning for gender equality work with initiating change. For sustaining and deepening change, identified themes are: tackling resistance and understanding and countering postfeminist thinking and including men into networks or establishing networks for men, to engage them in GE work. For adopting



an intersectional approach, themes such as integration of immigrant women in R&I, as well as targeting organisational networks that promote integration. For gendered innovations, multidisciplinary work to enhance innovations in different fields is an issue and here the indication is that there is great potential for multidisciplinary networks, that could take up this theme. For monitoring inclusive gender equality, themes could include data collection, monitoring, assessment, and evaluation, especially to ensure proper address of unethical behaviour. These themes are crucial for establishing a necessary network.

The Irish national expert indicates a need or use for the twinning of RPOs with and without experience of GEPs for all the topics except adopting an intersectional approach, which instead could be boosted with examples, experience and promising practices. The indicated network for all five topics is the existing national Advance HE Athena SWAN Ireland National Committee and Practitioner Network.

6. Training Resources

English training resources offered by the four national experts of the Northwest country cluster cover a range of topics, and most are research-based or produced/offered by different kinds of initiatives or projects. Topics include sexism and Gender-based Violence, resistance, GEP implementation, unconscious bias and stereotype-countering tools, recruitment, handling resistance, change management, inclusive leadership, and GEP / gender mainstreaming implementation, as well as gendered innovations. Also included are resources on fathers at work and a methodology for addressing gender inequality through structured conversations and social games.

Table 13. Training resources in English

Country	Title	Description	Link
Denmark	Picture a Scientist	Picture a Scientist is a 2020 documentary highlighting gender inequality in science. The movie tells the stories of several prominent female researchers, and brings to light the barriers they encountered, including cases of discrimination and harassment	https://www.pictureascientist.com/
Denmark	SPEAR virtual training materials	Virtual training materials on recruitment, GD&I, resistance and stakeholder engagement The material is output of the EU H2020-funded SPEAR project (Supporting and Implementing Plans for Gender Equality in Academia and Research)	https://gender-spear.eu/virtual-materials
Denmark	On The Agenda: Mosaic®	Mosaic® uses common gender equity issues as a natural starting point to encourage participants to	https://ontheagenda.eu/mosaic/



		discuss and reflect on the meaning and practice of inclusive leadership	
Denmark	SexismEDU	<p>A website with useful resources and a handbook in English (the handbook is at the time of writing this under contract for publishing in both Danish and English)</p> <p>A podcast series, 'do you know sexism', supplementing the website and handbooks in both Danish and English is also available</p>	<p>https://sexismedu.dk/</p> <p>https://www.spreaker.com/show/do-you-know-sexism</p>
Denmark	Develop Diverse	Develop Diverse is the world's first software tool that automatically analyses stereotypic content for gender, age, and ethnicity in texts and proposes non-stereotypic alternatives.	https://www.developdiverse.com/product/
Sweden	Implement Diversity works in different kinds of organizations, has also worked in the academic sector.	"We do seminars and workshops as well as offer advice on how organizations successfully can implement gender equality, diversity and inclusion in the workplace. We support our clients with education for management and employees, advice on how to assure the quality of the recruitment process from a diversity and inclusion perspective, develop policies, make compensation surveys, KPI's for gender equality and diversity, and support you in your work with the Active measures of the Discrimination Act. We do consultancy work in Sweden and globally."	https://implementdiversity.com/english/
Finland	Fathers at work	by Emilia Kangas, Anna-Maija Lämsä & Suvi Heikkinen	https://www.youtube.com/watch?v=ayAKwblsog4
Ireland	SAGE: Creating a Gender Sensitive Institution	<p>Course modules:</p> <ul style="list-style-type: none"> - Change Management for Gender Equality - Unconscious Bias - The Gender Dimension in Research <p>This course has been developed to provide valuable knowledge for those in higher education who wish to advance gender equality in their workplace, and to address gender imbalances in academia and research.</p> <p>It includes methods and strategies for promoting gender equality and aims to give you a solid understanding of how to create an increasingly gender sensitive organisation in your place of work.</p>	https://www.tcd.ie/tcgel/international-projects/SAGE/creating_a_gender_sensitive_institution/



This course is an output of the SAGE (Systemic Action for Gender Equality) Horizon 2020 project.

Training resources in national languages include Ireland and Sweden the same as above (the Swedish resource is both in English and Swedish). Thus, three national language resources are listed from Denmark and Finland, including a guide on how to conduct a good conversation with a young person about gender sexuality and identity (Denmark), GenderLAB, a research-based lab combining Design Thinking and norm criticism to create innovative, concrete and sustainable solutions to complicated challenges and problems related to Gender Equality and cultural change (Denmark), and lastly a workshop on standard (GE) terminology developed and delivered by Malin Gustavsson (Finland).

Table 14. Training resources in national languages

Country	Title	Description	Link
Denmark	LGBT+ Danmark: Guide til den gode samtale om køn og seksualitet med en ung person	A guide about how to have a good conversation about gender, sexuality and identity with a young person.	https://lgbt.dk/guide-til-den-gode-samtale-om-koen-og-seksualitet-med-en-ung-person/
Denmark	KVINFO: GenderLAB: Trivsel og bedre bundlinje,	GenderLAB is a laboratory that combines Design Thinking and norm criticism to create innovative, concrete and sustainable solutions to complicated challenges and problems related to Gender Equality and cultural change.	https://kvinfo.dk/genderlab/
Finland	Ota normiterminologia haltuun.	Get acquainted with standard terminology – a workshop given by Malin Gustavsson	https://www.youtube.com/watch?v=wggMSiw026U



7 Conclusions

The Northwest country cluster is characterised by considerable overall progress. Ireland and Sweden are well advanced with widespread uptake of systematic and comprehensive gender equality efforts, well well-developed, solid and comprehensive legal and policy frameworks. Particularly for the R&I and HE sectors, there are strong gender equality movements and leadership backing with supportive participatory democratic processes, promising advances in terms of data collection and monitoring and initial intersectional practices that are explicitly designed to be further developed. Finland is almost on the same level with solid legal and policy framework and widespread uptake of gender equality efforts and also has strong gender equality movements and political recognition, even if these efforts are not systematised or comprehensive to the same degree as Sweden and Ireland, in particular about data collection and monitoring. Denmark is the least advanced of the four, in several respects, not least reflected in the somewhat less comprehensive legal and policy framework, the recent GEP uptake (and only really as a response to the HEU GEP requirement), weakened democratic processes with low regard for expertise, widespread postfeminist and neo-sexist public discourse and strong counter-movements. Similar backsliding tendencies are also on the rise in Finland and Sweden.

Across the four countries, the emphasis is on initiating (except for Sweden) and sustaining and deepening change, with less on monitoring or adopting an intersectional approach. The two most underdeveloped topics are intersectional approaches and gendered innovation (in general) but in separate and distinct ways. Intersectionality is increasingly recognised as an important (new) area to integrate in order to achieve equality, diversity and inclusion, even if knowledge and examples are still scarce and the practice is imbued with insecurity and unclarity concerning ethical considerations. Irish and Swedish authorities, HEIs and some RFOs have taken initial steps to adopt intersectional approaches that in different ways may prove to be promising, but these are still at most gender and one other dimension and otherwise, where given due consideration, grounds for discrimination are primarily treated separately and not in combination (i.e., an additive approach). Legal and policy frameworks are overall inadequate and there is in general insufficient data, knowledge and hardly any practice examples. Furthermore, no real and practicable requirements are implemented (except to some degree in Ireland) and even where there is extensive legislation, practice is inadequate for the task, so it seems there is a fair share of ‘fumbling in the dark’.

Gendered innovations, in contrast, are in many cases not even understood as a systematic endeavour to take gender and other specific social categorisations into account in research, education and innovation content (e.g., data, methodology, design, execution, impact) in order to qualify and ensure applicability to the entire demography. Instead, it is often misunderstood as an issue of representation and equal access, and while these are important equality aspects, this erroneous conceptualisation of gendered innovations hampers systematic knowledge generation, awareness and recognition of the importance of gendered innovation. This is reflected in the very scant engagement in this topic across the four countries – and again here Sweden and Ireland are most advanced, for instance through RFO requirements implemented. There may be signs that some sectors (e.g., IT and Health), and some private companies are beginning to orient themselves to these perspectives, and this is largely due to a bottom-up demand and ever-so-slowly growing public recognition, due to popular



dissemination and the wake of #metoo movements in Sweden, Finland and Denmark. The EU GEP requirement, matched with some Swedish and Irish RFO requirements, could initiate a systematic approach, fostering an evolving understanding, recognition, and practice.

Data collection and monitoring is likewise most advanced, systematic, comprehensive and embedded across the sectors in Ireland and Sweden, allowing for national and inter-institutional benchmarking and the growth of a body of knowledge to track and monitor progress. As already mentioned, both Sweden and Ireland are gradually including data on additional discrimination factors. In Sweden, ensuring cross-coordination between gender and equal opportunities within their organisation, and, in Ireland, including race/ethnicity data in mandatory data collection and monitoring. Finland has the longest trajectory in data collection, even so, this is indicated as being focused more on collection than on systematic monitoring. It is also the case in Denmark, where data collection has only really been systematically implemented in preparation for the HEU GEP requirement, but a growing recognition and burgeoning practice is currently under way. Neither Finland nor Denmark therefore boasts the possibility for benchmarking. Across the types of organisations, in all four countries, HEIs, closely followed by RFOs, have the most advanced data collection and monitoring and are most comprehensively documented and subject to legislation, while NGOs are least so. Public and private RPOs along with NGOs and other non-profit organisations are to a much larger degree diversified and legal frameworks are perceived as not applicable. In general, inclusive gender equality efforts would benefit greatly from advancing this topic – most in Denmark and Finland, but also in Ireland and Sweden. Thus, continuous efforts are required to address challenges, improve data collection, ensure data transparency and accessibility, set standards, foster inclusivity (e.g., by providing disaggregated data in different social categories), data monitoring and expand monitoring efforts to include a broader range of organisations within the R&I sector across countries.

As for the uptake of GEP – or, especially in the case of Sweden, equivalent measures – HEIs and RFOs in Ireland and Sweden are well advanced and can no longer be defined as newcomers. While Finland has strong feminist movements and longstanding gender equality traditions and practices and has made considerable advances, GEPs seem to be somewhat less advanced and comprehensively embedded in comparison with Sweden, and even if most HEIs and RFOs have GEPs (and have had so for a while), all other Finnish organisations are defined as relative newcomers to GEP-efforts. In Denmark, the implementation of GEPs in HEIs and other organisations is a direct result of the HEU GEP requirement, and thus all Danish types of organisations are newcomers to GEP-work – and much more pronounced than in any of the other three countries in the cluster. However, there is evidence of a surge in interest, understanding and engagement in the work from a growing body of practitioners in the sector. The prevalence of GEPs grows scarcer in public and private RPOs in all four countries and it is difficult to obtain information about the prevalence of GEPs in NGOs and other non-profit RPOs.

In conclusion, one of the most striking characteristics of the Northwest country cluster is the fact that even if this cluster counts some of the most comprehensively advanced contexts for gender equality efforts at all levels in the world – Ireland and Sweden – these advanced practices coexist with urgent and perpetual needs for promotion, argumentation, awareness raising, education, training, capacity building, definition and upholding of legislative and policy requirements, continuous focus and handling of implicit and explicit resistance and backsliding.



Even if this urgency and pressure here can seem less than in other contexts, and the road paved to some extent, it is still as real and pressing as in less advanced countries and contexts. One obvious conclusion from this is that advancement towards inclusive gender equality is not synonymous with a once-and-for-all elimination of the problem of inequality/ies. Instead, the spectrum between ignorance, blindness and resistance to inequality, on the one hand, and comprehensive and effective enlightened practices growing ever larger and more differentiated, on the other hand. This growth occurs alongside the development of a more nuanced and high-quality knowledge base and an increasingly competent group of engaged actors. Therefore, it is important to remain vigilant and aware, as the threat of backsliding always persists.



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INSPIRE

D2.2 Central West Country Cluster Report

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19 September 2023



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D2.2 Central West Country Cluster Report

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EM	Europa Media Szolgaltato Non Profitkozhasznu Kft, Hungary
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SRU	Stichting Radboud Universiteit
Fraunhofer	Fraunhofer Gesellschaft zur Forderung der Angewandten Forschung EV, Germany
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GESIS	GESIS-Leibniz-Institut für Sozialwissenschaften EV, Germany
INNO	Innosystems Symvouleutikes Ypiresies Kai Efarmoges Pliroforikis Ypsilis Technologias Monoprosopi Idiotiki Kefalaiouchiki Etaireia, Greece

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List of Acronyms

CCR	Country Cluster Report
CoP	Community of Practice
CV	Curriculum Vitae
EC	European Commission
EDI	Equality, Diversity and Inclusion
EO	Equal Opportunities
ERA	European Research Area
GE	Gender Equality
GEP	Gender Equality Plan
GBV	Gender-based violence
GI	Gendered Innovation
HE	Higher Education
HEI	Higher Education Institution
HR	Human Resources
ICT	Information and communications technology
NAP	National Action Plan
NGO	Non-governmental Organisation
PFI	Pact for Research and Innovation
RFO	Research funding organisation
RPO	Research performing organisation
R&I	Research and Innovation
R&D	Research and Development
SDG	Sustainable development goals
STEM	Science, Technology, Engineering, Mathematics

1 Introduction

This is one of the four EU27 country cluster reports which analyse the results of the expert survey conducted by INSPIRE, a Horizon Europe project aimed at building a sustainable centre of excellence on inclusive gender equality in research and innovation (R&I).

INSPIRE survey

The survey involved at least one expert in each EU27 Member State and provided crucial support to the INSPIRE research programme on structural change towards inclusive gender equality in R&I, through:

- collecting information and analysis on policy developments and research debates at the national level; and
- identifying engaged stakeholders, other potential experts and relevant resources in the country, as well as collecting suggestions to support existing or potential initiatives for developing new communities of practices (CoPs).

The information collected was also meant to be a useful resource for the R&I ecosystem in Europe and beyond, including policy makers, researchers and equality practitioners across Europe.

The survey focused on **structural change towards inclusive gender equality in R&I organisations** in the country, defined as a long-term, sustainable process aimed at building an institutional environment (values, norms, structures and procedures) in which inclusive gender equality is widely discussed and explicitly embraced in organisational and individuals' practices having a demonstrable impact on reducing gender and other axes of inequality and discrimination within the organisation.

A **Gender Equality Plan (GEP)** is an **instrument** to institutionalise a gender equality policy and implement a structural change process. In the survey, GEP was defined according to the eligibility criterion and minimum requirements established by the European Commission to participate in Horizon Europe. Organisations may adopt similar/equivalent instruments to implement structural change or alternative instruments. These **alternative instruments** may focus only on gender or be interventions that fall under the umbrella of Equality, Diversity, Inclusion (EDI) policies, or just diversity policies.

The survey addressed **five topics** of interest related to structural change:

- **Initiating change:** How organisations can be encouraged to adopt a gender equality policy (GEPs and equivalent/alternative measures) based on local knowledge, experience and change movements as well as evidence-based tools (e.g., gender equality audit).
- **Sustaining and deepening change:** How organisations can address resistances and sustain and deepen change by building institutional gender competence, dedicating resources and structures, promoting evidence-based measures and broadening the scope of intervention (e.g., integrating sex/gender analysis in curricula or research content; implementing a sexual harassment protocol).

- Adopting an **intersectional approach**: How organisations can move from GEPs and/or EDI interventions to inclusive intersectional GEPs fostering change towards equality.
- Implementing **gendered innovations**: How innovation clusters and private R&I companies can be encouraged to implement gendered innovations - that is to innovate by integrating methods of sex and gender analysis into their R&I products or services, ideally taking into account also other axes of inequality and discrimination.
- **Monitoring inclusive gender equality**: How organisations can support an evidence-based inclusive gender equality by implementing effective monitoring conceptual approaches, tools and indicators - in particular in the four topics identified above (initiating change; sustaining and deepening change; adopting an intersectional approach; implementing gendered innovations).

The survey addressed structural change in all types of R&I organisations:

- Research funding organisations (e.g. research Ministries and public bodies funding basic and applied research; innovation agencies; other public and private institutions funding research and/or innovation).
- Research performing organisations:
 - Higher education institutions (public and private)
 - Other public research performing organisations (publicly funded research institutes)
 - R&I companies (e.g., private companies providing R&I products or services)
 - NGOs and other non-profit research performing organisations (e.g., private R&I foundations)

Country cluster report

The comparative analysis of the survey was conducted in four country cluster reports: North West countries, Central West countries, Southern countries and Central East and Eastern countries.

This Central West country cluster report analyses the results of the survey in six EU countries: **Austria, Belgium, France, Germany, Luxembourg and the Netherlands.**

The information used to elaborate this report was collated by the following experts:

- Austria: Julia Greithanner, Florian Holzinger, and David Walker
- Belgium: Dounia Bourabain
- France: Suzanne de Cheveigné
- Germany: Carolina Wienand-Sangaré, Merve Yorulmaz, and Susanne Bühner
- Luxembourg: Jennifer Dusdal
- the Netherlands: Yvonne Benschop

For further details regarding the methodology followed to collect the information and elaborate this report, please refer to the Methodological Annex.

2 Legal and policy framework

This chapter describes changes in the legal and policy framework since 2021 regarding GE in R&I organisations within the Central West European Country Cluster, including the countries of Austria, Belgium, France, Germany, Luxembourg and the Netherlands. This is followed by a brief analysis of the general situation regarding intersectional policies, policies on gender innovations, and non-discrimination legislation in the region, as well as an abstract of the national experts' assessment of the current legal and policy framework in each country across the five thematic areas.

Changes in legal frameworks

The experts from Belgium, France, Germany, and the Netherlands reported legal changes in their respective countries since the GEAR tool was updated in 2021. These changes encompass various domains such as labor law, civil service, private businesses, and the R&I sector. The Annex contains further information regarding the individual changes to the legislative framework.

In **Belgium**, the considered legal changes were not at the national level, but rather at the federal state level of the Wallonia-Brussels federation, focusing on addressing discrimination, harassment, and other forms of violence in Higher Education. In **France**, legislative changes dating from 2018 to 2021 target various areas. Some explicitly target the HEI sector and/or R&I sector in general, for example, by requiring gender action plans for the civil service (thus most RPOs) and HEIs. Different Ministries are also required to monitor gender equality efforts. Also, the mandatory publication of a GE index in HEIs and RPOs was imposed. The legislation in the private sector targets medium to large companies. For example, companies with more than 50 employees are required to publish a GE index and companies with more than 1000 employees a quota of the under-represented sex among executive managers and governing bodies applies. The **German** expert explained that the presence of former Chancellor Angela Merkel marked a positive advance in favour of GE, especially in the private sector. For instance, a bill was introduced mandating the appointment of at least one woman on private companies' boards with four or more executives. Likewise, legal changes in the scientific field were mentioned by the experts such as the establishment of a Federal Foundation for Gender Equality, along with substantial amendments to the Higher Education Laws, among others. However, some of these amendments are not on the national level, but rather at the federal state level. In the **Netherlands**, legislation also addresses the gender composition of different decision-making bodies of companies setting targets and quotas.

The experts from **Austria and Luxembourg**, on the other hand, consider that since the GEAR tool's information in 2021, there have not been any regulatory changes in these two countries regarding GE in R&I. In conclusion, in the Central West cluster, the experts from four out of six countries referred to various legal changes. However, it has to be noted that not all of them were implemented after 2021, but also earlier changes were considered of high relevance by the experts.

Changes in policy framework

Similarly to the legal frameworks, the experts from Austria, Belgium, France and Germany affirm that since the GEAR tool update (2021) there have been policy changes, such as the introduction of new strategies and plans within their respective countries. Some of the mentioned policies precede 2021, yet they were included due to their acknowledged significance by national experts. National experts from **Luxembourg** and **the Netherlands**, did not report any policy changes in this field and timeframe.

In **Austria**, the policy reforms include the Austrian National ERA Action Plan and the Overall Austrian University Development Plan (2025-2030) that were both published in 2022 and include numerous objectives on GE. The former aims to support HEIs, RPOs and RFOs with the GEP process, and features activities on the gender dimension in R&I, gender based violence, sexual harassment and promote cross-sectoral GE dialogue. The latter also provides an important basis for the performance agreements - contracts that Austrian universities negotiate with the Federal Ministry of Education, Science and Research every three years. In addition, one Austrian Ministry has also issued a guideline on GEPs for HEIs and RPOs. In **Belgium**, the reported political activities are all at the federal state level and not at the national level. In Flanders, the activities target gender based violence and sexual harassment, for instance, by planning to create an external central complaints office for transgressive behaviours. In the Brussels region, the 'Regional Innovation Plan' was introduced, which expects the R&I agency Innoviris to work on gender balance in juries and expert panels, funding models that enable equal opportunities, and considers diversity in the group of end users. In **France**, several action plans have been introduced. Two are applicable to the public sector and address the topics of professional equality between men and women (Plan d'Action pour l'égalité Femmes-Hommes et la prise en compte du genre 2020-2023), as well as gender based violence (Une nouvelle étape dans la lutte contre les violences sexistes et sexuelles dans l'enseignement supérieur et la recherche - Plan d'action national 2021-2025). One is an inter-ministerial plan for GE and targets all sectors; it includes a section on economic and professional equality (Toutes et tous égaux - Plan interministériel pour l'égalité entre les femmes et les hommes 2023-2027). Moreover, one French Ministry issued a guide to good and innovative practice for equality in industry workplaces. In **Germany**, the national expert reports that the Federal Ministry of Education and Research views the consideration of gender diversity and equality as an essential quality standard for conducting research and a strategic advantage in R&I. Thus, it plays a vital role in many of their policies such as in the Excellence Strategy – a funding programme for cutting-edge research. The fourth funding phase of the “Professorinnenprogramm” (2023-2030) has started in 2023, which amongst others, features the concepts of gender controlling and gender-sensitive professorial appointment management.

Remarkably, gender based violence was addressed in policy frameworks of several countries (Austria, Belgium – Flemish Region, France). In conclusion, it can be stated that since the GEAR tool's last information was published in 2021, policy changes have been more common than legal changes in the Central West cluster.

Intersectional policies

According to the national experts, no explicit intersectional policies can be identified in Belgium, France, the Netherlands, or Luxembourg. In the **Netherlands**, however, there is the National action plan for greater diversity and inclusion in higher education and research, which claims to follow an intersectional and integrated approach. In **Germany**, one funding programme for migrant women (by the European Social Fund for Germany, 2021-2027) was mentioned and one report, which acknowledges multidimensional discrimination (“mehrdimensionale Diskriminierung”). In addition, in 2022, the German Research Foundation (DFG) introduced a new initiative regarding their research-oriented equality and diversity standards. This initiative aims to incorporate the concept of intersectionality. In **Austria**, one strategy in the higher education context explicitly considers intersectional aspects (Nationale Strategie zur sozialen Dimension in der Hochschulbildung). Within this strategy, intersectional aspects of university drop out are recognised. Other policies, which take further inequality dimensions into account, frame this as inclusion or diversity rather than intersectionality. For example, the Austrian National Higher Education Development Plan 2019-2024 considers educational background of parents, ethnic origin, family background, sexual orientation, etc., as single dimensions, but does not pay close attention on how they intersect and mutually reinforce patterns of marginalization.

Policies on gendered innovation / private sector

The EU Commission has proposed that, in the near future, any European company with more than 100 employees will be required to publish data on the difference in salaries between men and women on a regular basis. This still has to be approved by the individual member states. In Austria, Germany and Luxembourg, the experts reported a variety of policies addressing R&I companies. While there are gendered innovation policies in place addressing RPOs and HEIs, in some countries, namely Belgium, France and the Netherlands, the national experts reported that there are no policies in place that directly target gendered innovations in the private sector. This does not imply that R&I companies in Belgium, France and the Netherlands are not subject to requirements by RFOs. For instance, the French CNRS requires the incorporation of gender dimension into the content of R&I projects and considers it when evaluating project proposals.

In **Austria**, the most prominent policy is the FEMtech programme, which supports GE in R&I in multiple ways: first, by supporting female researchers, and second, by facilitating exchanges between gender experts, practitioners and women in R&I. In addition, the programme supports research-intensive companies to implement GE initiatives (and supports internship opportunities). The Ministry also promotes research projects with gender-relevant content through calls for FEMtech RTI projects and FEMtech research projects, where gender relevance and the integration of gender experts is a mandatory criterion. Another prime example is the Laura Bassi 4.0 programme that was initiated by the Ministry of Digital and Economic Affairs and implemented by the FFG. The second call of this programme was targeted at organisations that want to contribute to a digital future with equal opportunities. The Laura Bassi 4.0 Network on Digitisation and Equal Opportunities provides an opportunity for those seeking equal opportunities in digitisation to contribute their experience, knowledge and energy. In **Germany**, the Act to Promote the Transparency of Remuneration Structures was

introduced to improve the gender pay gap¹. The Act also applies to the private sector. Additionally, the Federal Ministry of Education and Research issued a call for proposals titled "Gender aspects in research" with the goal of strengthening Germany's excellence and international competitiveness in research, development and innovation by improving the living conditions of all people regardless of gender, age or other aspects of diversity. Another goal of the calls was to gain scientific knowledge about causes and mechanisms that impede equality. Within the programme, funding was provided for innovative structural projects with a model character that systematically and permanently integrate gender aspects into the research process for excellence in research, science and innovation. In **Luxembourg**, there are few gendered innovation policies, but rather policies that target companies. For instance, the IMS Luxembourg initiated the Diversity Charter Lëtzebuerg, which is signed by a variety of organisations that are committed to diversity promotion and management through concrete actions promoting cohesion and social equity. Another example, provided by the national experts, is the Positive Actions programme by the Ministry of Equality between Women and Men (MEGA). This voluntary programme supports companies who wish to have their best practices in the workplace certified and it helps companies to develop best practices.

Prohibition of discrimination

All of the countries of the cluster have non-discrimination legislation in place. Some with reference to the European anti-discrimination laws, while others refer to national legislation. In some countries, non-discrimination e.g. as a human right is part of the constitution, namely in Germany and the Netherlands, while others have broad equal treatment acts in place, others are in the area of employment, and others have specific acts implemented (e.g. the Gender Anti-Discrimination Act in Belgium). It is striking that the number of protected characteristics varies between countries; while they are very detailed in Belgium and France, in Austria, for instance, they are less detailed.

All of the countries in our Cluster prohibit discrimination based on sexual orientation, sex and/or gender. However, in some countries there are further specificities: For instance, in France, gender identity and pregnancy are included and in Belgium, there are additional related features such as motherhood, pregnancy, gender expression and gender reassignment. In addition, all countries have established non-discrimination legislation regarding religious or philosophical beliefs. Countries such as Luxembourg, Belgium and France also include political or other opinions. Disability is also a characteristic, which can be found in the non-discrimination legislation of all countries. Belgium and France have also included health-related characteristics such as genetic characteristics, or actual or future state of health. Characteristics regarding the cultural and ethnical background of a person such as ethnicity, race, colour, descent, national/ethnic origin, nationality, language, or surname are also part of all of the countries' non-discrimination legislation. Austria, Belgium, Germany, Luxembourg

¹ The gender pay gap refers to the disparity in earnings between men and women in the workforce. It represents the average difference in pay between all men and women, usually expressed as a percentage and highlights the unequal distribution of income between genders, often indicating that women, on average, earn less than men for performing similar work or occupying similar positions (Bishu und Alkadry 2017). The gender pay gap can be influenced by various factors, including occupations segregation, discrimination and differences in work experience or education, and societal norms. Reducing the gender pay gap is an important aspect of achieving gender equality in the workplace. For additional information on the gender pay gap in the EU (EC 2022).

and France also prohibit discrimination on the basis of age. Some countries (Belgium, France, Luxembourg) also included characteristics related to the social situation of a person such as civil status, (birth) property, social origin, family situation, economic situation, loss of autonomy, association with a national minority, place of residence or bank account. Interestingly, the Netherlands have included an open characteristic (“on any ground whatsoever”).

Assessment of current legal and policy framework

According to the assessment of the national experts, regarding initiating change, all countries are deemed to have reached an adequate level of development. However, sustaining change reveals a dichotomy. Austria, Germany, and Luxembourg are considered to have made adequate progress, while Belgium, France, and the Netherlands seem to fall short with insufficient results. Concerning the adoption of intersectional approaches, the majority of countries are classified as having either highly insufficient or insufficient progress, with the exception of Germany, which is regarded as having an adequate approach. Austria and Germany are deemed to have adequate gendered innovation policies, whereas France, the Netherlands and Belgium as well as Luxembourg are considered to have insufficient or highly insufficient legal and policy frameworks in place. Only two countries, Austria and France, achieve an adequate level of monitoring, while in the Netherlands and Germany it is considered insufficient, and Belgium as well as Luxembourg fall into the highly insufficient category.

In general, it appears that within the Central West cluster initiating change stands out, but other topics, particularly the intersectional approach are inadequately addressed. According to the national experts, Belgium appears to be trailing behind, while the performance of other countries seem to vary depending on the specific subject.

Table 1. Assessment of national legal and political framework, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Austria	Adequate	Adequate	Insufficient	Adequate	Adequate
Belgium	Adequate	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient
France	Adequate	Insufficient	Highly insufficient	Insufficient	Adequate
Germany	Adequate	Adequate	Adequate	Adequate	Insufficient
Luxembourg	Adequate	Adequate	Highly insufficient	Highly insufficient	Highly insufficient
Netherlands	Adequate	Insufficient	Highly insufficient	Insufficient	Insufficient

3 Structural Change

This chapter gives insights into structural change regarding GE in R&I in the Central West country cluster. First, an overview of the results of the literature review by the national experts is given. Then, the topics of initiating change, sustaining change, as well as intersectionality and their respective barriers and facilitators are addressed. This is followed by a brief description of the topics of gendered innovations and data monitoring.

3.1 Literature Review

National experts were requested to provide at least five relevant documents as sources from their countries including sources in their national language. Based on the abstracts, the literature was classified according to the topics and the type of R&I organisation it addresses (see Table 1). The full references and related codes are displayed in the Annex.

A large part of the literature that was provided by the national experts addresses HEIs. It should be noted, however, that the national experts in this country cluster are mostly from the higher education sector and thus have the most expertise in this area. The literature on RFOs mainly originates from Austria. The topics of Sustaining and Deepening Change, as well as Initiating Change, seems to be well covered in the body of literature of this cluster. It is striking that only experts from the Netherlands and Austria provided literature with an intersectional perspective. Additionally, there was not much literature provided on the subject of gendered innovation.

Table 2. Selected literature by country, topic and type of R&I organisations

Topics	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies (working on R&I)	NGOs and other non-profit research performing organisations	Not specified / overall society
Initiating change	AT2; LU1	AT2; BE1; BE2; BE5; BE7; LU1; LU2; FR6; DE1; DE2; NL8	AT2; LU1; LU2; DE1; DE2	AT2; BE7; FR1; FR4; FR9; FR10;		BE9; LU1; FR1; FR2
Sustaining and deepening change	AT5	AT1; AT3; AT4; AT9; AT11; BE3; BE4; BE5; BE6; BE7; BE10; BE11; FR8; DE2; DE3; DE4; DE5; DE6; NL2; NL4; NL5	AT10; AT11; FR8; DE2	AT10; BE7; FR10; NL7		AT8; FR5; NL6
Adopting an intersectional approach		AT1; NL4				NL1
Implementing gendered innovations	AT2;	AT10; BE2; FR3; DE2	AT10; DE2	AT2; AT10		NL6
Monitoring inclusive gender equality	AT5	AT4; AT12; BE6; BE7; BE8; BE11; FR7; FR8	AT7; AT10; AT12; BE7; BE8; FR7; FR8	AT6; AT10; AT12; BE8?; FR7; FR11; NL7	AT12; BE8?	BE9; NL3

Assessment of current knowledge

This section is based on the assessment of the national experts on the current state of knowledge in their country. The current knowledge on the topic of initiating change is assessed as highly adequate in all countries. However, regarding sustaining change, it is striking that Belgium is considered to have highly insufficient knowledge, while for the rest of the countries it has been assessed as highly adequate. Current knowledge on intersectionality was assessed as insufficient or highly insufficient in all countries except Germany. Germany and Austria seem to be the frontrunners in this cluster regarding the knowledge on gendered innovation, while it is considered insufficient in the other countries. In Germany and the Netherlands, the current knowledge on monitoring inclusive gender equality is rated as insufficient, while in the other countries it was rated highly adequate.

In conclusion, it can be stated that similar to the legal and policy framework, the current knowledge base covers the topic of initiating change well. While sustaining change is also well covered in most countries, the others topics (particularly intersectionality) seem to have received less attention.

Table 3. Assessment of current knowledge in the country, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Austria	Highly adequate	Highly adequate	Insufficient	Highly adequate	Highly adequate
Belgium	Highly adequate	Highly insufficient	Highly insufficient	Insufficient	Highly adequate
France	Highly adequate	Highly adequate	Insufficient	Insufficient	Highly adequate
Germany	Highly adequate	Highly adequate	Highly adequate	Highly adequate	Insufficient
Luxembourg	Highly adequate	Highly adequate	Highly insufficient	Insufficient	Highly adequate
Netherlands	Highly adequate	Highly adequate	Highly insufficient	Insufficient	Insufficient

3.2 Initiating Change

Degree of uptake of GEPs

This section describes the national experts' assessment of the degree of uptake of GEPs in the different types of R&I organisations. The presence of GEPs appears to be widespread across HEIs and RFOs. With other public RPOs, the situation is more diverse, characterised by varying degrees of adoption. Notably, France appears to be a leader in the implementation of GEPs across multiple sectors.

GEPs have been adopted by many or most RFOs in almost all of the countries, with the exception of Germany, where only some have done so. Similarly, in all countries, most or many

HEIs have introduced GEPs. In Austria, France and the Netherlands, most or many other public RPOs have adopted GEPs, whereas in Belgium, Germany and Luxembourg only some other public RPOs have done so. The adoption of GEPs in private companies varies among countries, with some having GEPs in France, a few or none in Austria and Belgium, and unknown status in Germany, Luxembourg, and the Netherlands. Concerning NGOs, there is little information available about the adoption of GEPs in most countries, however, it was mentioned that in France some have adopted GEPs and a few or none in Belgium.

Table 4. Degree of uptake of GEPs by type of R&I organisation

Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Austria	Most or many have GEPs	Most or many have GEPs	Most or many have GEPs	A few or none have GEPs	n.a.
Belgium	Most or many have GEPs	Most or many have GEPs	Some have GEPs	A few or none have GEPs	A few or none have GEPs
France	Most or many have GEPs	Most or many have GEPs	Most or many have GEPs	Some have GEPs	Some have GEPs
Germany	Some have GEPs	Most or many have GEPs	Some have GEPs	n.a.	n.a.
Luxembourg	Most or many have GEPs	Most or many have GEPs	Some have GEPs	n.a.	n.a.
Netherlands	Most or many have GEPs	Most or many have GEPs	Most or many have GEPs	n.a.	n.a.

Newcomers to the implementation of GEPs

France stands out as a frontrunner in the implementation of GEPs across many sectors, as no type of R&I organisation was considered a relative newcomer to GEP implementation by the national expert. However, in the remaining cluster, the prevalence of newcomers varies from country to country in relation to the different types of R&I organisations.

While GEPs in RFOs were described as widespread in the section above, RFOs are considered relative newcomers in Austria, Luxembourg and the Netherlands. In Belgium, France and Germany, RFOs were not considered newcomers. HEIs are considered as relative newcomers in the Netherlands and Luxembourg, but in other countries, this is not the case. With the exception of France and Germany, other RPOs are generally perceived as newcomers in the field of GEP implementation. Similarly, with the exception of France, private companies are regarded as newcomers by the national experts. Unfortunately, the current lack of relevant information precludes any assessment of the status of private companies in Luxembourg. France is the only country within the cluster where NGOs are not considered newcomers to GEPs. In the other countries of the cluster, NGOs are either regarded as newcomers in the case of Belgium, Germany, and the Netherlands or there is a lack of sufficient information on this matter in Austria and Luxembourg.

For some countries, further information on the background of the assessments is available: In **Austria**, while many RFOs have long been committed to promoting GE, they are still relatively

new in terms of GEPs. Many other Austrian RPOs have introduced GEPs as part of Horizon Europe requirements, although some have been active in GE work for some time. Private R&I companies in Austria are often small and medium sized businesses and rarely have GEPs or similar documents in place, even if they have sporadic measures such as flexible working hours arrangements. Only larger and international companies sometimes have diversity plans in place. In **Belgium**, the picture is similar. Other RPOs are considered newcomers compared to HEIs, and those operating in the HE context and under funding programs such as Horizon Europe have only relatively recently introduced GEPs. The national expert from Belgium considers that there is not enough encouragement, incentives, or sanctions for private companies and NGOs to implement GEPs. For NGOs, a lack of structural resources for hiring diversity/equality officers is also perceived as a relevant factor. In **Germany**, the low uptake of GEPs in NGOs and private companies is explained by the lack of enforcement through the legal or policy framework. In the **Netherlands**, the adoption of GEPs in RFOs, universities, and other RPOs has been driven primarily by Horizon Europe requirements; while NGOs and private companies GE work, if any, is voluntary based. In **Luxembourg**, all types of R&I organizations are either considered relative newcomers or there is no conclusive answer, as the Luxembourg Gender Working Group, which includes the university, other public RPOs and the RFO, was launched in 2020 and all GEPs were adopted thereafter.

Table 5. Type of organisations as ‘newcomer’ implementing GEPs

Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Austria	Yes	No	Yes	Yes	n.a.
Belgium	No	No	Yes	Yes	Yes
France	No	No	No	No	No
Germany	No	No	No	Yes	Yes
Luxembourg	Yes	Yes	Yes	n.a.	n.a.
Netherlands	Yes	Yes	Yes	Yes	Yes

Alternative instruments to GEPs

In many countries, HEIs and private companies often appear to rely on alternative instruments² rather than GEPs. With respect to RFOs and other public RPOs, the situation seems somewhat varied, however, there is not enough information to draw conclusions. Alternative instruments are more often used in France and the Netherlands, while they seem to be less common in Germany. Alternative instruments often cover the area of diversity.

While alternative instruments are commonly used by RFOs in France, Luxembourg, and the Netherlands, they have seen limited uptake in RFOs in Austria, Belgium, and Germany. Except for Germany, most countries adopt alternative instruments in HEIs. Other RPOs widely use

² Alternative instruments may focus only on gender or be interventions that fall under the umbrella of Equality, Diversity, Inclusion policies, or just diversity policies.

alternative instruments in France, Luxembourg and the Netherlands, but not in Austria, Belgium and Germany. Alternative instruments are commonly used in private companies in Austria, France, and the Netherlands, but not in Luxembourg. There was no reliable information available about alternative instruments in private companies in Belgium and Germany. Except in France, where alternative instruments are not frequently used, there is little information available on their use by NGOs.

When looking at the type of alternative instruments, it is apparent that diversity and inclusion plans or strategies are the most common instruments. In **Austria**, HEIs had to introduce women promotion plans due to legislation, while in bigger private R&I companies they sometimes have diversity strategies, which often focus on the inclusion of employees with different cultural backgrounds or ethnicity. In **Belgium**, all HEIs have a diversity or EDI policy, and GE is one of the topics included. In **France**, there is a national diversity certification called AFNOR for all types of R&I organizations except NGOs, which now includes GE (previously the two standards were separate). In **Luxembourg**, there is the Positive Actions Programme by the Ministry of Gender Equality, which supports companies in their GE efforts (see chapter 2). One public RPO has adopted a diversity charter and the University of Luxembourg a GE policy, as well as a code of conduct, which features a section on LGBT+. In the **Netherlands**, Diversity and Inclusion Plans are common in RFOs, other RPOs and private R&I companies, while Diversity Equity (or Equality) and Inclusion plans are common in HEIs.

3.2.1 Main barriers and facilitators for initiating change

Regarding main barriers and facilitators for initiating change, it can be observed that supportive policy frameworks, as well as strong gender/feminist movements and frontrunner organisations (as orientation) seem to support initiating change. A lack of resources and lack of commitment were common barriers in the cluster.

Luxembourg stands out in the Central West cluster, because the only university dedicated to research was established in 2003 and the RFO Luxembourg National Research Fund (FNR) was established in 1999, making it a relative newcomer in the fields of R&I. According to the national expert, promising GE movements and top management commitment in R&I organisations can be observed, but they are not yet consolidated. The legal framework in Luxembourg was described as well elaborated and a Ministry of Equality between Women and Men was established in 2015, which both are considered facilitating factors. There is also a strong commitment towards GE and willingness to support structural change as a consequence of the Horizon Europe GEP criterion. All types of R&I organizations are believed to be affected by these factors, with the exception of NGOs and private businesses, for which no literature or other information was available.

In **Austria**, the structural and cultural environment with gender stereotypes and strict hierarchies in HEIs seem to be difficult to change and were considered a barrier for RPOs and HEIs. For RFOs, GE can be thought at odds with prevailing notions of excellence, which can have an effect on how funding is structured. For other RPOs and private companies, there is also a lack of structural support, for example due to the lack of policy framework, and awareness or sometimes even interest. In contrast, the supportive legal and policy framework that proposes GE goals in the performance agreements between universities and the Ministry was considered a facilitator for HEIs. Active working groups on EO and feminist activism were

also identified as facilitators. Other RPOs seem to be positively influenced by the gender criteria in funding programmes (both national and international), feminist research and the commitment of their top management. The first also seems to apply to private R&I companies, which apply for funding or other incentives, but there is a tendency to reach companies, which already have a basic understanding of GE. For Austrian NGOs, there is not sufficient information available.

In **Belgium**, several facilitating factors have been identified for HEIs and RFOs. These factors include structural support like policy frameworks and gender audits. For HEIs, the presence of diversity officers and gender experts, as well as the existence of robust GE movements and networks were also noted as facilitators. Conversely, for RPOs, collaborations with HEIs have a positive impact. On the other hand, a lack of diversity or GE officers is observed across various RFOs, RPOs and private companies. This could be attributed to either insufficient resources or a lack of commitment. Furthermore, strong GE movements appear to lack in the field of RPOs and NGOs. Moreover, structural change in private companies and NGOs does not seem to be supported by either the legal or the policy framework. Concerning RFOs, their commitment has been noted to be primarily centered around gender monitoring, rather than more comprehensive initiatives, and the commitment of private companies was assessed as low. There were no particular facilitating factors noted for private companies.

In **France**, a lack of awareness, as well as a lack of human resources can be observed as a barrier in all types of R&I organisations. Also, the republican tradition, which refuses discrimination by principle and thus seems to have the potential to ignore actual discrimination appears to act as a barrier according to the national expert. In private companies, there seems to be a lack of conviction about cost efficiency, which inhibits initiating change. Regarding facilitators, the #MeToo-debate and policy frameworks from EU and national level were named. For HEIs, there is also a policy framework by the Ministry of Research, which proactively supports GEPs. Moreover, there is a gender research tradition in some universities (e.g. Toulouse, Lyon), which is assessed to trigger change. Other RPOs seem to be influenced by the proactive role of the Centre national de la recherche scientifique (CNRS) regarding initiating change and its gender research tradition.

In **Germany**, GEPs designed with the involvement of all relevant organisational stakeholders and tailored to the organisation have been found to facilitate initiating change in all R&I organisations. Transparent public objectives and monitoring and evaluation processes that promote awareness and accountability were also considered as facilitating change. Linking GE to R&I excellence also seems to support the initiation of change as it can reduce resistance.

For the **Netherlands**, it is most striking that there were no barriers noted in relation to RFOs and HEIs initiating change, as they all have already done so. However, for other public RPOs, as well as for private companies and NGOs, an absence of urgency, lack of ownership of the topic, low management commitment, as well as organisational cultural beliefs in non-discrimination and equal opportunities were identified as barriers. For RFOs, HEIs and other RPOs, the national policy framework is considered as a facilitator of change. This framework includes EU policies and funding, the UN Sustainable Development Goals (SDGs) and the National Plan for Greater Diversity and Inclusion in Higher Education and Research. For HEIs, it was furthermore noted that aligning with more advanced R&I organisations seems to

facilitate the initiation of changes. For private organisations, individual change agents, such as managers and EDI experts who advocate for GE seems to be a relevant factor for change.

3.3 Sustaining Change

Stakeholders for and against structural change

In most countries, stakeholders were relatively similar across the different types of organisations – with some exceptions across the types of organisations (e.g. Ministries that apply to private companies, but not to HEI). In many countries such as Austria, Belgium, France, Germany and Luxembourg, Ministries were identified as stakeholders promoting structural change. In Austria, Belgium and Germany, according to national experts, concrete inter-organisational associations and networks are also key agents for change. Within the organizations, GE and EDI staff and researchers, and, in many cases, top management are seen favourably. Right-wing parties and sometimes neo liberal company associations (e.g. in Austria) are mentioned as the most common stakeholders against structural change. However, in many countries, there were no specific stakeholders mentioned which work explicitly against structural change. However, the national experts of Germany, Luxembourg and France have listed stakeholders who they suspect are potentially working against structural change.

The main stakeholders in the **Netherlands** for structural change for all R&I organisations are internal stakeholders like EDI staff and EDI-minded managers, in the case of HEIs, deans, academics with EDI specialisation and diversity networks. Political right-wing parties and movements, as well as mixed loose coalition of privileged majority are considered stakeholders against structural change. In **Luxembourg**, the European Commission, policymakers at the Ministry level, top management, internal working groups, and trade unions (with the exception of RFOs) are among the supportive stakeholders. Gender officers are also present in HEIs and RPOs. In HEIs, there is also a very strong staff delegation mainly established by administrative staff and staff with permanent contracts. There were no explicit stakeholders mentioned against structural change, except for potentially the board of governors that decides upon the university's general policies and strategies and oversees the university's activities.

In **France**, several political stakeholders are highlighted: the EU and national political actors (particularly the Ministry of Higher Education and Research, as well as the Ministry of Equality among women and men, diversity, and equal opportunities for companies and NGOs). Similar to Luxembourg, there are no particular stakeholders against structural change, but the national expert observed right-wing parties beginning to put the topic into “wokeism”. In **Austria**, there are also several political supportive stakeholders: The Federal Ministry for Education, Science, and Research (BMBWF) is relevant for all R&I organisations (a bit less for companies), while the Federal Ministry for Climate Action, Environment, Energy, Mobility, Innovation and Technology (BMK) is relevant to RFOs, other RPOs and NGOs. The Ministry for Social Affairs, Health, Care and Consumer Protection (BMSGPK) was named relevant for NGOs and the Ministry for Labour and Economy (BMWA) for companies. The HEIs also have the Rectors Conference (UNIKO) and ARGE Gluna (Working Group for Equal Treatment and Equality at Austrian Universities). The Austrian Funding Agencies are also seen as stakeholders for structural change, for example the Austrian Research Promotion Agency (FFG) (for other RPOs and private companies), the Austrian Science Fund (FWF) (for HEIs) and the Austrian

Promotional Bank (AWS) (for companies). The political parties ÖVP and FPÖ are considered stakeholders against structural change in all R&I organisations. For private companies, the Chamber of Commerce and Industry (WKÖ) and Federation of Austrian Industries (IV) can also be named as stakeholders who potentially work against structural change.

In **Belgium**, there are supportive associations for RFOs such as BeWise (Belgian Women in Science) or the Comité Femmes & Sciences in the Brussels Region, or the Standing Working Group on Gender in R&I in Wallonia-Brussels. RFOs also have the Department of Economics, Science and Innovation (EWI) in Flanders as a supportive stakeholder. For HEIs, there is also the Flemish Inter University Council with a specific working group on GE in academia and Rose (network of gender studies). Internally, several gender researchers and practitioners are considered relevant stakeholders. Similar to Austria, RFOs such as the National Fund for Scientific Research (FNRS) and Research Foundation - Flanders (FWO) are mentioned as supporting structural change in Belgian HEIs. Belgian stakeholders against structural change also come from the right-wing political context. In HEIs, some top management were also against effective GEPs. There was no information available for private companies in Belgium.

In **Germany**, the national political bodies, as well as the state level bodies are described as supportive for the RFOs and the HEIs. The RFOs in turn are seen as supportive for the HEIs. One key stakeholder for structural change is the DFG (German Research Foundation), which introduced research-oriented equity and diversity standards, the 'cascade-model', and the Pact for Research and Innovation between the four large German research societies (Fraunhofer, Helmholtz, Leibniz and Max-Planck), which foresees annual GE monitoring. Another key stakeholder is the GWK (Joint Science Conference). For HEIs, there are also the German Rectors' Conference, the German Council of Science and Humanities, and professional associations, often specifically for women. There are also networks of EO officers.

Impact of socio-cultural, political and economic contexts on institutionalisation of GE in R&I³

The national experts of the Central West cluster notice positive developments regarding the institutionalisation of GE (e.g. support by legal/policy frameworks, funding programmes), but progress is often described as slow. Cultural change seems to be hard to achieve as gender stereotypes and/or gendered norms and values still play a key role across the cluster.

In **Austria**, within the political context, frameworks and binding targets to develop and carry out policies promoting GE are issued and there is a strong commitment and policy support, which is a strong driver for the institutionalisation of GE in R&I. For example, the Ministry responsible for research aims at promoting EO and gender studies in HEIs (Wroblewski, 2017; 2018). The support and funding provided by Austrian RFOs and EU projects also promotes this institutionalisation and initiated the GEP development in most HEIs, other RPOs, as well as permanent positions for GE and diversity work. However, the institutionalisation in non-university RPOs and private companies is limited (Schacherl, 2021; Wroblewski, 2017). As for the socio-cultural context, despite increasing efforts to promote GE in academia, the central practices of research and evaluation have not changed significantly. Thus, a cultural shift is necessary in order to tackle cultural and structural barriers (e.g. gendered hierarchies)

³ This section is based on the summative assessments of the national experts and does include the national expert's references.

(Wroblewski, 2017). Even though activism and stakeholder networks could achieve awareness-raising and capacity building, Wicher & Frankus (2021) argue that it is a long way until significant cultural and structural change will materialise.

In **Belgium**, gendered norms and traditional gender values are persistent. This is reflected in a gendered division of labour (IGVM 2016), which can lead to a leaky pipeline, as part-time work is possible, but less favourable for an academic career. In addition, gender bias in relation to women in power positions remains a persistent issue (VLIR-JA 2019; Voorspoels 2018; Voorspoels and Bleijenberg 2019). Furthermore, women are underrepresented in R&I due to a gendered labour market, but are roughly equally affected by precarious working conditions as men (EC, 2021). Belgium's political environment is characterised by a complicated federal structure, in which responsibility for GE measures is divided between the national and federal state governments. Even though gender inequality in general was addressed relatively early on by policy makers and there is a supportive legal framework, it is, according to the national expert, still not considered a top priority in the R&I sector (Meier and Celis 2009; Schandevyl, Woodward, Valgaeren and De Metsenaere, 2013)⁴. The law on gender mainstreaming, however, established in 2007, aims for an integrated approach to the gender dimension in all areas of government policy. One of these domains is science, where the department of science policy (BELSPO) is in charge of introducing structural change and is committed to several aims, like GE in juries and commissions of research programs (BELSPO 2023). Economically, R&I funding is highest in Flanders, but in general, it is almost equal to the EU-27 average (Statistiek Vlaanderen 2022). There is insufficient information available on the budget for GE measures, but it is expected to be low according to the national expert.

Similar to Belgium, the R&I system in **Germany** is not only regulated by the national level, but also strongly by the federal state level. Within the wide range of the applicable state law and the federal German Framework Act, each RPO has the freedom to choose the scope and the extent of its GE policy. As a result, RPOs adopted GE targets and incentives were implemented, but because there are few legally binding measures, GE in R&I progress is slow. Thus, the national expert assesses that for decades the German R&I system has been characterised by strong R&I capacities (especially in STEM disciplines) on the one hand, and a low share of women among researchers and inventors (especially in STEM and businesses) on the other hand. According to the expert, culturally, the traditional division of labour plays a strong role, which is reflected in women working more part-time than men. These existing stereotypes prevent women's' career advancement. Moreover, social and fiscal policies reinforce these traditional gender roles according to the expert.

In **Luxembourg**, gender stereotypes are still reported to be persistent in R&I, particularly in STEM. Furthermore, the R&I sector is influenced by Luxembourg's culturally diverse and international society (nearly 50% expats), which may pose challenges when institutionalizing GE and accounting for socio-cultural variances. Gender parity does play a role in the FNR's funding programmes such as ATTRACT or RESCOM and the research culture is described as inclusive by the national expert. Despite the fact that Luxembourg is the only country in the cluster with a Ministry exclusively dedicated to GE, the Ministry's efforts in the R&I sector should be expanded according to the national expert. Regarding economic context, it can be observed that Luxembourg's R&D expenditure is lower than the European average, yet it

⁴ The literature listed on the subject is from over a decade ago, which may possibly reflect this.

comes with the lowest gender pay gap in the EU (in general, not only R&I) (Leythienne and Pérez-Julián 2021; Eurostat 2022).

In **France**, even though GE is apparently not a ‘very legitimate issue’ according to the French national expert, GE in R&I is becoming more important, with progress being made in both the public and private sectors. Thus, the public R&I sector and significant corporations are introducing change, but sustainable change is moving slowly. The public sector pays attention to gender based violence, with universities required to put up anti-harassment units. Intersectionality is being criticized as ‘wokeism’. The French National Research Agency (ANR) supports gendered innovations. Legal responsibilities to publish statistics and gender indices provide a monitoring framework. French research apparently approaches GE from an individualistic standpoint, focusing on school-level choices and stereotypes (Collet, 2019). Yet, recent research investigates collective factors such as trade unions' roles or performs critical analysis of GE policies in industry – which predominantly benefits women in executive positions (Pochic, 2021; 2022). There are some elements of GEP evaluations or assessment beginning to become apparent (e.g. Laville, 2022 or by the Ministry MESRI, 2022).

In the **Netherlands**, GE efforts receive mixed reactions. Some members of parliament, for example, have questioned the necessity of the National Action Plan for Greater Diversity and Inclusion in Higher Education, while others would prefer additional measures. Furthermore, there are resistances visible as a study revealed that diversity professionals at universities face (online) intimidation (NOS Nieuws 2022). Populist parties are growing in political power and, while they applaud some aspects of diversity like the “gay-friendly” Netherlands, they condemn others such as gender-neutral restrooms and non-binary people. Implicit gender stereotypes have a significant impact on academic careers, particularly full professorships, especially when combined with apparently ineffectual gender balancing policies and a masculine and competitive academic culture (Teelken et al 2021). Recently, awareness of sexism, racism, harassment, and bullying in the Netherlands has grown in response to reporting of problems in academics, sports, and the media. The conversation has switched to social safety, a larger and presumably more appealing concept. In academia, social safety is regarded as a precondition for effective science, and it is seen as a systematic issue linked to organizational structures and cultures (KNAW report 2022). In general, part-time work (below 35 hours per week) is described as a fundamental element of Dutch society, in terms of the sociocultural and economic context. Although part-time employment is considered as a general strategy for a better work-life balance and to combat stress and burnout and the Netherlands are the country with the highest percentage of part-time work for women and men, more women (70%) than men (20%) work part-time (Emancipatiemonitor 2022). Thus the implementation of such measures is not gender equal.

Main practical lessons and good practices

The practical lessons from the Central West cluster address a variety of topics and activities, which shows a multitude of learning opportunities. An overarching topic includes for example the role of monitoring and what needs to be considered in this regard. Countries such as Austria, Belgium, France and the Netherlands have learnings in the area of recruitment, gender balance and HR development. Practical lessons also address the importance of specific stakeholders such as trade unions in France or inter-organisational working groups in Luxembourg.

In **Austria**, it can be observed that due to external pressure, Austrian HEIs have made more progress in GE in comparison to other RPOs. Formal GEPs and diversity plans in RPOs frequently fail to materialise without continuous monitoring and pressure on management (Englmaier, 2021). The AntiBias program of the University of Graz was a successful activity as stakeholders from all areas of the university participated (Wroblewski & Striedinger, 2018). Another example is the concept of the “Non-binary university” at Vienna’s University of Fine Arts, which is the first and only Austrian university with an equal gender distribution. It now has a significant focus on feminist, gender, queer and decolonial studies and aims at deconstructing binary gender roles and promoting gender diversity (Schacherl, 2021). While quotas in the Austrian university law regarding university committees enhanced female participation, prejudice and marginalisation remain issues in the work of the women in these committees. Thus, for an inclusive environment, a cultural transformation is required (Enzenhofer et al., 2021).

In **Belgium**, there is a lack of monitoring and research on the success of GE initiatives in R&I, particularly outside of HEIs (Bourabain, 2021). Two types of interventions could be identified by the national expert as successful. First, most HEIs have focused on implementing gender inclusive hiring, recruitment and promotion procedures, e.g. through bias training, gender inclusive language, and active recruitment. Even though this has led to increased awareness and a higher number of recruited women, their targets of gender balance were not reached. Second, most HEIs plan to develop gender monitoring among students and staff, which will increase accountability.

In **France**, a report on private-sector equality plans and agreements emphasised the need for stronger HR policies and underlined the role of trade unions (Pochic 2019). They also point out that computerised CV analysis and the requirement of organised training in engineering schools, tend to favour men. Attention also needs to be paid to lower-skilled workers, who are often less well reached by GEPs (Pochic 2021, 2022). Individual Ministerial support has been beneficial in developing GEPs in universities (MESRI, 2022), but training on the gender pay gap and collaboration among universities are required.

In **Germany**, there are various information and advisory services offered by the Ministry such as a GE check for SMEs (BMFSFJ 2020). The audit “Beruf und Familie” is a voluntary strategic management tool for businesses and institutions and is similar to GEPs. It targets e.g. the areas of In-kind services for families or work organisation. Another good practice example is the voluntary Diversity Charter (Charta der Vielfalt), which aims for a prejudice-free working environment and has a search function for success stories (including SMEs).

One good practice example from **Luxembourg** is the Gender Working Group, which brings together 14 representatives from six R&I organisations in order to combat gender inequality. The coordination is managed by the FNR and the initial outcomes involve the adoption of GEPs along with the provision of data on gender (im)balance in many R&I organisations (e.g. University of Luxembourg). However, until now, the working group does not include companies. The Luxembourg Institute of Science and Technology (LIST) is considered as a role model organisation in Luxembourg due to its commitment to diversity and inclusion.

The Inclusion Monitor in the **Netherlands** (not restricted to R&I) draws the conclusion that comprehensive attention is needed throughout the entire employment experience, not only

recruitment and selection. Second, goals should be SMART in order to permit proper progress monitoring (EIGE). Third, activities should not only address all employees, but also specific groups of staff in tailored programs. Fourth, EDI efforts in recruiting and selection should be integrated into the larger EDI plan. Fifth, the effectiveness of interventions should be monitored (Senen et al. 2021). An analysis of EDI policies and work of diversity officers at universities shows that a rhetorical change from 'gender' to 'diversity and inclusion' is not sufficient; it also needs to be clearly reflected in responsibilities and tasks and an increase in resources, as well as additional support by boards and management (Bonjour et al. 2021). Essanhaji and van den Brink (2022) bring to attention that the area of organisational structures and cultures receives more attention than fixing the numbers and fixing the knowledge. Another practical lesson is that algorithms need to be designed in a deliberately non-discriminatory manner in order to not be biased (Netherlands Institute for Human Rights 2020). Practical lessons on intersectional approaches are firstly to ask questions about identities that matter and question institutional and historical structures. Secondly, continuous improvement is necessary. Third, marginalised groups should be included in activities/research ('nothing about us, without us'), and fourth, marginalised groups should be represented at all levels (BKB 2021).

3.3.1 Main barriers and facilitators for sustaining change

Overall, a lack of resources and sufficient commitment seem to present common barriers for sustaining change in the Central West country cluster. Common facilitating factors include commitment, supportive policy frameworks, regular monitoring and evaluation, and adequate resources.

In **Austria**, RFOs are monitored internally and externally, which enables them to take further steps. Also, gender mainstreaming and diversity management is anchored in their strategies. However, for sustainable change in RFOs, the criteria for excellence would need to be designed in a more inclusive way. This is also reflected in HEIs, in which the male-dominated meritocracy oriented culture hinders sustainable changes. However, via the performance agreements with the state, GE work is well institutionalised within Austrian universities. Austria has also implemented a comprehensive gender monitoring systems for universities. Most universities have statutory provisions on GE, active working groups on equal opportunities and implement activities across various areas of GE work. At other RPOs, there is often a lack of adequate resources allocated by the management, a lack of discourse on GE in institutions, insufficient commitment and the absence of sanctions for non-compliance. While there are positive examples and many have adopted EO plans, there is often a lack of knowledge about the goals of GE work and/or resistance. The legal framework is less supportive for sustaining change at other RPOs than at universities. At private companies, there is still a lack of expertise, management support and resources for GE work. While many companies are taking measures to increase the number of female staff, the gender dimension does not receive the same attention. The GE criteria for funding act are conducive to sustaining change in other RPOs and private companies. There is insufficient information available on NGOs.

In **Belgium**, there are some differences across R&I organisations. For RFOs, a lack of external evaluations, as well as adequate resources was noted as hindering for sustaining change. In addition, GE movements are described as weak in the field of RFOs. While regular gender monitoring was described as facilitating sustaining change at RFOs, the monitoring seems to not be used to improve the practices, which is in turn hindering. Similar to RFOs, monitoring

and external evaluations at HEIs do not lead to improvements due to a lack of potential sanctions. Management support and commitment in HEIs is viewed as not extending beyond initiating change, which is reflected in not providing the resources necessary for sustaining change. In other RPOs, private companies and NGOs, the management commitment is described as even less than in HEIs and RFOs. Some RPOs, private companies and NGOs also lack a supportive legal and policy framework and strong GE movements.

In **France**, the national expert assesses a lack of human resources and the concentration of GE work on individual change agents who might leave the organisation as hindering factors. As for facilitators, the #MeToo-type events seem to have increased overall awareness on gender issues. These barriers and facilitators apply to all types of R&I organisations, according to the national expert.

For **Germany**, adequate financial resources, a supportive governance framework, gender expertise, top management commitment, target values and a clear strategy, suitable communication and promotion of GE interventions, participation, as well as willingness and interest of staff are mentioned as facilitating factors for sustaining change in all R&I organisation types. Thus, the whole organisation should be involved and interventions should be tailored to the needs of the respective organisation. In addition, synergies with other initiatives can act as facilitating factors. The framing of gender issues as being inextricably linked to excellence in research at the EU level had a positive effect on funding and helped to create a change in discourse.

In **Luxembourg**, the resources are estimated as adequate for sustaining change in RFOs. A regular monitoring was initiated for RFOs and internal and external evaluations are available for HEIs. The legal and policy framework was rated as supportive for HEIs and other RPOs. The GE movements are rated stronger within other RPOs than in HEIs, which is reflected in faster implementation of GEPs. There is commitment of the top management at HEIs, but some lack competence. In HEIs, there is a high mobility of researchers and big cultural diversity within R&I organisations, which might complicate sustainable changes due to potentially less motivation to get involved, different understandings of GE in R&I or communicative difficulties. In general, as the topic of GE is rather new in Luxembourg and change was recently initiated, it seems that the foundation was laid, but more time is needed to unfold its potential for sustaining change. There is not sufficient information available on private companies and NGOs in Luxembourg.

In the **Netherlands**, the barriers and facilitators were the same across the different types of R&I organisations. Passionate individuals who push the change, managers and policy makers who prioritise EDI, are identified as facilitators of sustaining change. In addition, adequate time and financial resources and regular monitoring and measuring impacts of activities are relevant for sustaining change. Identified barriers include a lack of resources such as: time and budget, coordination with social movements and interest organisations, accountability and clarity of responsibility, in addition to high turnover of EDI officers. Furthermore, there seems to be more attention paid to representation than to structural / institutional GE work or the gender dimension. There also seem to be resistance against concrete EDI measures. Paper tigers are also described as a barrier, as is the perception that discriminated groups are problematised rather than the organisational structures or culture behind the discrimination.

3.4 Intersectionality

As already described above, intersectionality is not yet well anchored in the policy frameworks of the Central West cluster. In Belgium, France and Luxembourg, no policies were found to be explicitly intersectional, while there are some sporadic examples in Germany, Austria and the Netherlands. Thus, the national experts deem the legal and policy framework concerning intersectionality as insufficient or highly insufficient in all of the cluster's countries save Germany. In addition, the knowledge on intersectionality is considered not sufficient by the experts and with the exception of some literature from the Netherlands and Austria, national literature provided by national experts rarely demonstrated an intersectional approach. Similarly, only few engaged stakeholders were reported to be active in the context of intersectionality (see chapter 5). In the next section, we will shed more light on the situation of intersectionality in each country and present main barriers and facilitators for adopting an intersectional approach.

3.4.1 Main barriers and facilitators for adopting an intersectional approach

The main barriers and facilitators for adopting an intersectional approach as well the progress made for adopting such approach differs significantly across the countries, as well as across the respective R&I organisations. Barriers for adopting an intersectional approach in all countries include limited knowledge and awareness of intersectionality, inadequate institutional commitment and limited engagement with intersectional approaches. Facilitators are projects and funding lines that include the integration of intersectionality into research content, collaborations with activists and the institutionalisation (e.g. diversity strategies or dedicated offices for GE and diversity). While there are shared barriers and facilitators across these countries, each has its own unique context and challenges.

In **Austria**, there are some policy documents referring to the promotion of diversity and inclusion in HEI, but there is no clear commitment from Ministries (and the European level) regarding intersectionality in research funding and it is unclear who is responsible for intersectional approaches in research funding (Ministry or RFOs). There is also a lack of expertise and knowledge on what intersectionality means for RFOs. Therefore, the criteria for excellence need to be further developed in an evidence-based way and more inclusive criteria based on intersectional approaches need to be adopted. However, the relatively strong policy framework that commits RFOs to implement GE measures (GEPs are in place) and the fact that RFOs have GE or Equal Opportunity offices does show that there is a great potential for expanding the focus to intersectional approaches by making use of existing resources. One of the two major Austrian RFOs has already mentioned the concept of intersectionality in their GEP, but at this point, they do not require an intersectional approach within project applications. Concerning RPOs, there is also a lack of awareness as inclusivity is only incorporated in some HEI diversity strategies. Moreover, there is a lack of data monitoring for discriminated categories other than gender. It has to be noted that is not due to legislation, but because the monitoring is not developed and therefore mainly focuses on GE and no other diversity dimensions. Some RPOs also include other diversity dimensions in their monitoring, but to this point, they are not required. While some have taken comprehensive measures, others only made general statements against discrimination. There is a lack of commitment on the level of RPOs. A related issue is that most of the diversity strategies and measures are voluntary. Nonetheless, HEIs often fulfil the institutional prerequisites that can increase the

commitment towards intersectionality. These include the establishment of working groups for equal treatment and coordination offices for GE and diversity. Another facilitator is the collaboration with activists, which has expanded the focus to include the rights of LGBTQIA+ individuals. HEIs also support campaigns in which experiences of discrimination at universities can be shared or groups that advocate for inter* individuals (e.g. VIMÖ). Other examples could be the “Non-Binary-University” or the “AntiBias programme”. Regarding other RPOs, the lack of binding regulation and target goals for the adoption of an intersectional approach poses a barrier. The national expert underlines that GE measures often do not include non-binary perspectives. While the diversity strategies contain measures that affect the internal organisation, the adoption of intersectional approaches in research content remains underdeveloped. As with private R&I companies, for other RPOs guidelines and criteria of funders are strong facilitators that can lead to an adoption of intersectional approaches in the future. Most RPOs have GE and EO officers that could facilitate the adoption of intersectional approaches. They perform diversity monitoring to track progress. The calls for positions also specifically target individuals with diverse backgrounds. Within R&I companies, diversity aspects are often included in GE strategies. However, diversity is often understood as inclusion of employees with different cultural backgrounds and ethnicity and often only focus on representation. In R&I companies, there is still a lack of knowledge and expertise regarding intersectionality. However, a strong facilitator, as in the case of GE, could be legal obligations as well as requirements by funding agencies. For instance, the Austrian Constitutional Court recognised the right to an individual gender identity, leading to an inclusion of other categories.

In **Belgium**, intersectionality is not considered at all according to the national expert, because there is a lack of legal/policy framework and a lack of intersectional GE movements that could facilitate public discourse. According to the expert, this is also due to a general lack of knowledge on intersectionality. Although several diversity policies have been introduced at RPOs, private R&I companies and NGOs, they are not put into practice as the different minoritised groups are still considered separately. However, the GE movements start to pick up on intersectionality according to the national expert.

In **France**, the national expert states that there is a resistance to considering intersectional approaches, as there is a culture of denial towards gender and race discrimination. The expert states that “race discrimination in particular ‘can’t happen’”, which is why surveys are generally not allowed to cover these issues. According to the expert, intersectional approaches are at present depicted as “wokism” and there is a general lack of awareness. However, some RPOs integrate an intersectional perspective in their research content. A strong supporting factor for an adoption of intersectional approaches by RPOs and RFOs could be the international influence on the funding system through exchanges with networks of funding organisations.

In comparison with other EU countries, **Germany** is lagging behind in taking GE measures and policies according to the national expert. Considering further criteria of discrimination has only been covered by the anti-discrimination agency of the German government, but the last report was issued in 2011. Still, the national expert has a positive outlook and states that Germany is in the middle of a cultural revolution where gender, cultural and ethnic identities are being disrupted and conservative thinking clashes with the claims of new generations. Therefore, at this point, there are diversity measures in place that aim at increasing diverse representation and try to mitigate discrimination and the integration of intersectional

approaches is not very progressed. However, there are some funding programmes and initiatives that include several diversity dimensions such as a programme on migrant women (funded by the European Social Fund), which acknowledges multidimensional discrimination and the DFG has issued a new initiative regarding research-oriented diversity standard in 2022, which aims to take intersectionality into account.

In **Luxembourg**, in general for all R&I organisations intersectional GE movements are considered weak or non-existing according to the national expert. However, the Ministry of Equality between Women and Men (MEGA) shows some awareness of intersectional approaches as there are some paragraphs on diversity in legal documents, but there is no practical implementation yet. RFOs such as the FNR are strong promoters of GE in R&I and highlight the importance of diversity policies, but there is no information on the practical implementation within the organisation. Nonetheless, all guidelines for research proposals include sections on GE and intersectionality to be taken into accounts by applicants. In some funding lines, this is an explicit criterion (e.g. RESCOM, Attract in). There is also some research on GE and intersectionality within Luxembourg's universities. However, the national expert underlines that researchers could be more involved in the development of strong gender and diversity policies by the top management. An additional facilitator on the HEI level could be the very active LGBT+ Students' association at the University of Luxembourg. Some, but not all institutes have specialised staff that is responsible for monitoring and implementing GE measures and policies and at times also take intersectionality into account. Concerning RPOs, especially in STEM fields there is no diverse composition of staff as the majority are male researchers. According to the national expert, this can have an impact on the disciplinary culture and about the perceived need to implement diversity policies. However, while this could be considered a barrier, it could also be a facilitator as these organisations try to attract and retain female researchers. RPOs are involved in networks that specifically focus on intersectionality and GE in R&I organisations, this could facilitate changes. According to the national expert, there is limited information on R&I companies as well as NGOs and it is unclear whether they adopt intersectional approaches.

In the **Netherlands**, there is also a lack of policy framework. According to the expert, this is due to a lack of knowledge on how to “work intersectionally” and because of the complexity of multiple intersecting categories. However, there is a National Action Plan for Greater Diversity and Inclusion in Higher Education and Research, which claims to follow an intersectional and integrated approach. In addition, there are funding lines of RFOs and consequent research projects performed by RPOs that at times include a relevant number of social categories. For instance, work on women of colour, people with different religious backgrounds, people with disabilities, LGBTQI+ community and people from diverse backgrounds with (dis-)abilities and elderly LGBTQI+. Therefore, at times an intersectional perspective is integrated in the research content.

3.5 Gendered Innovations

The topic of gendered innovations does not seem to be implemented in the private R&I sector systematically, but rather sporadically, if at all. In some countries, no real advancement can be observed (Netherlands, France, Germany) or there is limited information about it (Belgium), while in other countries measures or activities are in place (Austria, Luxembourg).

In **Austria**, there are not many private R&I companies working on gendered innovations. However, RFOs have taken a two-way approach to promoting gendered innovations. Firstly, by introducing funding schemes and secondly by requiring the integration of gender dimension in research content. In addition, the funding of networks contributes to the advancement of gendered innovations. For instance, the Austrian Research Promotion Agency's funding scheme on gendered innovations in the domain of technology development ("FEMtech research projects") aims at developing gender-sensitive technologies. The FEMtech research projects are leading to the advancement of gendered innovation, as they create visibility for the integration of gender dimensions and build up capacities and expertise in the domain. Another positive example leading to progress in the field of gendered innovations is the implementation of gender criteria in most of the research programmes of the Austrian Research Promotion Agency. Most research programmes require applicants to describe the gender relevance of their research topics and provide explanations if they do not deem it relevant. An example of a network promoting gendered innovations is the Laura Bassi Network on Equal Opportunities in Digitalisation, which leads to an advancement because it promotes gendered innovations in the ICT sector. While these three examples of the promotion of gendered innovations can be considered a first step, the impact of these policies was limited. On the one hand, the FEMtech funding programme was rather small in terms of budget and the amount of projects funded, on the other hand, gender criteria in funding programmes were assessed in the application phase, but not considered in the project reviews.

In **Luxembourg**, gendered innovations are not widespread in the landscape of R&I organisations, especially in the private sector and, at this point, specific innovation policies are not in place. Nonetheless, the national expert argues that there is some awareness about their importance. For instance, the research funding organisation FNR plays a pioneering role by implementing criteria into their guidelines for research proposals in certain funding schemes that address collaborative projects with R&I companies. In these project calls, applicants are required to outline how and in which way their research integrates gender dimensions and how they are planning to transfer findings into practice. According to the national expert, especially in the bio-medical field, collaborative projects are most promising as they integrate gendered innovations as important elements in their research process.

In **Belgium, France, the Netherlands and Germany**, according to the national experts, there is limited reliable information on the advancement regarding gendered innovations in private R&I companies. In **Belgium**, the national experts obtained information from the Department of Economy, Science and Innovation. However, the Department has indicated that gendered innovations have solely been introduced in RFOs and HEIs and gendered innovation policies have not addressed R&I companies. In **France**, there are no visible examples of gendered innovations, but according to the national expert, international practices could play a role. In the **Netherlands**, there is no reliable information on gendered innovations in private R&I companies. In **Germany**, gendered innovations are not well established or communicated and are rather absent in the portfolio of R&I companies. Policies and measures taken by private R&I companies are more targeted at diversity and equal career opportunities for all (e.g. female representation), than on integrating the gender dimension in research content. For instance, more than 4.800 R&I companies such as Biontech have signed a diversity charter ("Charta der Vielfalt"), promoting diversity in companies.

In sum, if there are activities, most of them seem to originate from funding organisations, which implement gender criteria or guidelines in their funding programmes or implement specific calls integrating the gender dimension. Overall, however, gendered innovations do not seem to be on the agenda of private companies in all countries. Some activities that were mentioned in the context of private R&I companies rather address activities that target the organisation (gender composition, working conditions, etc.) and not the gender dimension. It could thus be suspected that this part of GE work is more widespread than gendered innovation.

3.6 Data Monitoring

The data collection and monitoring of GE is a crucial aspect for understanding progress and can help to identify potential facilitators and barriers. While some countries have made significant progress in data collection and monitoring efforts (Austria, France, Germany, Luxembourg), others (the Netherlands) seem to lag behind. The national experts reported several challenges and gaps. For instance, the lack of standardisation and accessibility and the exclusion of diverse indicators are notable obstacles. However, several facilitators such as legislation, guidelines and working groups have also been reported. It can be observed that HEIs are more often subject to regulations than private R&I companies. As a result, the latter rarely provide relevant data on GE. Another trend is the shifting focus on intersectionality, as more diverse indicators are taken into account (e.g. in Austria).

In **Austria**, the data collection is advanced in HEIs and other RPOs, but there is a lack of data on private R&I companies. The GE survey in Austria includes diverse indicators such as staff composition, job contracts, age distribution, income structure, caregiving responsibilities, and challenges like the COVID-19 pandemic. However, there remains a gap in the inclusion of trans, inter*, and non-binary individuals in data collection. Additionally, since monitoring is voluntary, not all RPOs and R&I companies participate. In **Belgium**, the landscape for GE data is fragmented, with major differences in data collection methods. Progress has been made in specific sectors, driven by legislation and initiatives like the Gender Action Plan. However, accessing the collected data is still challenging, and areas like the intake and retention of women in academic careers lack comprehensive data. Guidelines provided by working groups have facilitated data collection and monitoring efforts, but there is a need for stronger networks in the private sector to support gender equality goals. In **France**, the Ministry of Higher Education and Research provides extensive statistics on GE in the public R&I sector. Obligations to publish statistics and gender indexes exist for HEIs, other RPOs, and private R&I companies. The legal requirements include targets for increasing the share of women in executive and governing positions and publishing corresponding statistics. All companies with over 50 employees must publish a GE index. In **Germany**, the research funding agency DFG monitors the achievements in the realm of GE and other research policy objectives defined in the "Pakt für Forschung und Innovation IV 2021-2030" (PFI) for the German research societies (Fraunhofer, Helmholtz, Leibniz and Max-Planck). The Pact for Research and Innovation has the goal of concerted action by the federal government and the states as well as the publicly funded RPOs and obliges organisations to comply with targets and monitor them accordingly. The PFI also contains targets for increasing the share of women on all levels. While the HEIs are also legally obliged for data collection and monitoring, there are no such obligations for private R&I companies according to the national expert. In **Luxembourg**, HEIs, RFOs, and public RPOs publish relevant data on GE in their annual reports. The "Gender Working Group"

focuses on monitoring and evaluating GE. The available data is descriptive and large-scale national data is missing. There is also room for improvement, particularly in advancing data collection and monitoring for inclusive GE and intersectionality. In the **Netherlands**, monitoring and progress in data collection are limited. Diversity plans across Dutch universities lack specificity in terms of responsibility, implementation timelines, and expected results. The importance of acceptability and relevance over specificity and measurability is emphasized. Data on other RPOs and private R&I companies are not available.

Overall, continued efforts are required to address challenges, improve data collection, set standards, foster inclusivity and prioritise intersectionality in the monitoring of data in R&I organisations across countries.

4 R&I Organisations

The table below includes an overview of various countries, as well as the number of HEIs, RPOs, and estimates for the number of R&I companies in each. Germany has the greatest number of HEIs and public RPOs, 120 of these HEIs are general universities, 246 are universities of applied sciences and 57 are universities of arts. A limited number of German HEIs are privately run (e.g., by the catholic church), but the majority of them are supported by the state (HRK 2022). France and Germany have extensive R&I ecosystems, whereas Austria and Luxembourg have smaller ecosystems, corresponding to the size of the countries (see Table 2). The Netherlands have a relatively small number of HEIs, but a strikingly high number of R&I companies, which also accounts for a high proportion of Research and Development expenditure (Goedhart and van Roekel 2022).

	# of HEIs	# of public RPOs	# of R&I companies
Austria	73	35	3872
Belgium	83	82	10840
France	64	6	21024
Germany	423	492	NA
Luxembourg	3	8	84
Netherlands	14	71	19720

5 Engaged Stakeholders

In general, policy makers, RFOs, and RPOs in the Central West cluster seem to be primarily engaged in the areas of initiating change and sustaining change. This is often followed by the topic of monitoring, while gendered innovations and an intersectional approach lag behind.

In countries such as Austria, Belgium and the Netherlands, specialised consultancies for initiating change as well as for sustaining change were identified. In Austria, France and the Netherlands, specialised consultancies for applying an intersectional approach were also listed, while only in Austria and France at least one consultancy for monitoring and only in Austria one for gender innovations was found. Moreover, experts on all the topics relevant for this research could be found in all countries, with the exception of Germany and Luxembourg in the area of gendered innovations, and Germany in the area of monitoring.

5.1 Policy makers

The national experts were asked to name up to three relevant policy makers who are engaged in structural change towards (inclusive) gender equality in R&I in their respective country and mark topics, in which these policy makers are engaged in.

Policymakers of the Central West cluster demonstrate a high level of participation in the domains of initiating and sustaining change. They also demonstrate involvement in the realms of monitoring and gendered innovation. It is noteworthy that only two policymakers from all

countries are known to be actively involved in the topic of intersectionality, indicating a potential area for additional investigation and involvement.

Table 7. Number of policy makers mentioned, by topic

	Initiating change	Sustaining and deepening change	Intersectional approach	Gendered innovations	Monitoring
Austria	2	2	0	1	2
Belgium	3	3	0	3	3
France	2	2	0	0	2
Germany	3	3	1	3	1
Luxembourg	2	2	0	0	2
Netherlands	3	3	1	0	0
Total	15	15	2	7	10

Please note: Policy makers can be active in more than one topic

5.2 Research Funding Organisations

The national experts were also asked to name up to three relevant RFOs who are engaged in structural change towards (inclusive) gender equality in R&I in their respective country and mark the topics, in which these RFOs are engaged in.

The listed RFOs are mostly engaged in the realm of initiating change. Following that is sustaining and deepening change, monitoring, and gendered innovation. However, only a few RFOs are interested in intersectional approaches, primarily in Germany and the Netherlands, reflecting a very limited concentration on this particular topic in other countries. Only German organizations are found to be involved in all five domains among the RFOs, indicating their broad involvement and dedication to fostering research in diverse areas.

Table 8. Number of RFOs mentioned, by topic

	Initiating change	Sustaining and deepening change	Intersectional approach	Gendered innovation	Monitoring
Austria	3	2	0	3	3
Belgium	2	0	0	2	2
France	2	2	0	1	2
Germany	3	3	1	2	2
Luxembourg	1	1	0	1	0
Netherlands	2	2	2	0	0
Total	13	10	3	9	9

Please note: RFOs can be active in more than one topic

5.3 Research Performing Organisations

Similarly, the national experts were asked to name up to three relevant RPOs who are engaged in structural change towards (inclusive) gender equality in R&I in their respective country and mark the topics, in which these RPOs are engaged in.

The RPOs are reported to be most active in the areas of sustaining and deepening change, as well as initiating change. Subsequent to the aforementioned categories, are monitoring, intersectional approach and gendered innovation. Only in Belgium and Germany the listed RPOs seem to cover all five thematic areas.

Table 9. Number of RPOs mentioned, by topic

	Initiating change	Sustaining and deepening change	Intersectional approach	Gendered innovation	Monitoring
Austria	0	3	3	0	1
Belgium	3	3	1	2	3
France	3	3	0	1	3
Germany	3	3	1	1	1
Luxembourg	3	1	1	2	0
Netherlands	3	3	1	0	1
Total	15	16	7	6	9

Please note: RPOs can be active in more than one topic

5.4 Communities of Practice

Based on the information supplied, the networks and Communities of Practice (CoPs) indicated have been identified as being very active in the domains of sustaining and deepening change and initiating change. Furthermore, they are involved in monitoring, gendered innovations, and an intersectional approach. Only networks and CoPs in Germany and Luxembourg have been identified in all domains.

Table 10. Number of CoPs mentioned, by topic

	Initiating change	Sustaining and deepening change	Intersectional approach	Gendered innovations	Monitoring
Austria	1	2	0	2	0
Belgium	3	3	0	0	0
France	3	3	0	1	3
Germany	3	3	1	1	2
Luxembourg	2	2	1	1	1
Netherlands	3	3	3	0	3
Total	15	16	5	5	9

Please note: CoPs can be active in more than one topic

5.4.1 Suggestions to support Communities of Practice

While there were few suggestions that included pre-existing Communities of Practice, national experts developed their own ideas of what might be valuable to address in a CoP. These ideas cover a wide range of topics across all of the thematic areas of initiating change, sustaining and deepening change, gendered innovation, intersectional approach and monitoring. Collaboration and practical implementation tools appear to be shared interests across topics. Furthermore, the extension of GE work to diversity and/or intersectionality was suggested not only on the topic of the intersectional approach, but across topics; from general suggestions

such as a framework for the practical implementation of intersectionality in general to more specific topics such as intersectional monitoring. The Annex contains a complete list of the suggestions across the domains.

6 Training Resources

The national experts were asked to provide one training resource in English, which is not already included in the GEAR tool or GE Academy, as well as one training resource in their respective language.

English training resources: The suggested training resources from Austria, Belgium, France, and the Netherlands cover many different areas and are not concentrated on one domain. The topics range from GEP experiences, GEP monitoring, male gender construction, RRI tools, gender balance/representation, over a gender stereotype board game to inclusive leadership. A list of the individual training resources can be found hereafter. The German and French national expert could not find any training resources in English, which were not already included in the GEAR tool.

Table 11. Training resources in English

Country	Title	Description	Link
AT	"Designing, Implementing and Monitoring a Gender Equality Plan - Practical Insights for Newcomers. Anita Thaler (IFZ Graz) and Jennifer Dahmen-Adkins (RWTH Aachen)	Description: In this presentation, the two presenters shared their experiences and expertise on the topic of designing, implementing and monitoring a GEP. The resource is a power point presentation. There is no audio available.	https://www.innovationsrael.org.il/ISERD/sites/default/files/inline-files/Tips_Newcomers_25.10.2021_final.pdf
AT	Monitoring GEPs in RPOs. Jennifer Dahmen-Adkins (RWTH Aachen) and Julian Anslinger (IFZ Graz).	Description: In this presentation, the two presenters give tips on how to monitor a GEP in a research organization. The resource is a power point presentation. There is no audio available.	https://www.change-h2020.eu/bilder/MonitoringGEPsinRPOs-Dahmen-AdkinsAnslinger.pdf
AT	Männer im Fokus (Men in focus) – TU Vienna	This page highlights gender relations from the perspective of men and presents their different realities of life in different areas. Common gender constructions strongly restrict many men in their actions. Predefined ideals are difficult to fulfil and are often not aspired to, but put a lot of pressure on them. The audio is in German, but there are English subtitles.	https://www.tuwien.at/tu-wien/organisation/zentrale-bereiche/genderkompetenz/gender-in-der-lehre/basiswissen/m-aenner-im-fokus
BE	RRI Tools	The RRI toolkit aims at involving society in science and innovation. It aims at connecting different aspects of the relationship between R&I and society: public engagement, open access, gender equality, science education, ethics and governance. When it	https://rri-tools.eu/about-rri

		<p>comes to gender equality, they look at the following aspects:</p> <ul style="list-style-type: none"> • promoting gender balanced research teams • breaking down gender stereotypes • Raising awareness towards and for gender-sensitive investment and funding • Ensuring gender-friendly workplace cultures • Considering the gender dimension in research and innovation • gender balance in decision making. <p>They target several stakeholders: policy makers, the research community, the education community, the business and industry and civil society organisations.</p>	
LU	Fonds National de la Recherche. "Where there is science, there is a woman." Accessed May 3, 2023	How does public research in Luxembourg measure up in terms of gender balance? What is being done to support and inspire a new generation of women in science? We delve into the situation in the Grand Duchy. It is hard to get around the word 'inequality' when speaking about women in science. In Luxembourg, a general trend in academia is reflected: The gender balance is nearly there in the beginning of the career, then the scales shift dramatically, and the proportion of women decreases on each career level. In addition to being underrepresented in numbers – or because of this – it is common for female scientists to experience bias in their career: Having to prove themselves more and to work harder to secure the same opportunities as their male peers, being disproportionately assigned teaching, feeling 'left out' after becoming a parent. In fields where women are the clear minority – such as engineering, maths, ICT and material sciences, this tends to ring particularly true. On this topic, discover the FNR series 'Science has no gender'. The source contains links to voices of female researchers in Luxembourg, some basic statistics, and an overview of selected initiatives that tackle the topic of interest.	https://www.fnr.lu/research-with-impact-fnr-highlight/wgiscience/
LU	GG	Board Game about gender stereotypes and research by Carole Blond-Hanten (Luxembourg Institute of Science and Research)	https://www.youtube.com/watch?v=7nz3EaL1Loo&t=6s
NL	Training Masterclass Inclusive leadership, Talent naar de Top	This is a commercial training, no material publicly available, but zooms in on the role that leaders have to play in setting the agenda and be a role model for inclusive behavior at work.	https://www.talentnaardetop.nl/en/training/training-courses-diversity-inclusion

Training resources in national language: Similar to the training resources in English, the suggested training resources in the national languages cover a wide range of topics and are not limited to a single thematic area. For Austria, three guidelines were mentioned, one on GEP development issued by a Ministry, one on designing teaching and learning spaces, and a third on non-binary / gender equitable universities. For Belgium, they included a toolbox on unconscious bias, for France a webinar on professional equality between men and women and for the Netherlands a training on (un)conscious bias in recruitment and a toolbox for inclusion for HR students. Below we include a list of the suggested individual training resources. The national expert from Luxembourg was not able to find training resources in the national language(s), which could be attributed to the prominence of English as the major language for

research communication or to the topic's relative novelty in Luxembourg. The German expert could not find any resource either.

Table 12. Training resources in national languages

Country	Title	Description	Link
AT	Leitfaden zur Entwicklung von Gleichstellungsplänen in österreichischen Hochschul- und Forschungseinrichtungen (Wroblewski, Angela; Englmaier Victoria). im Auftrag des Bundesministeriums für Bildung, Wissenschaft und Forschung und des Bundesministeriums für Klimaschutz, Umwelt, Energie, Mobilität, Innovation und Technologie.	This is a guideline for GEP development in Austrian Higher Education and Research organisations. It was written by two scholars (see above) and issued by the Federal Ministry of Climate Action, Environment, Energy, Mobility, Innovation and Technology.	https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&cad=rja&uact=8&ved=2ahUKEwjGyJ-f9dj-AhXfiv0HHZi0D6sQFnoECAkQAQ&url=https%3A%2F%2Fpubshop.bmbwf.gv.at%2Findex.php%3Fref_x_media_type%3Dpubshop_download%26rex_media_file%3Df_gleichstellungsplaene_hs.pdf&usq=AOvVaw1G2-VZzgLD0souENeKGrsi
AT	trans. inter*. non-binary. Teaching and learning spaces at universities reflecting on gender, critical of discrimination and and respectful	Guideline for designing teaching and learning spaces at universities	https://www.akbild.ac.at/de/universitaet/frauenfoerderung-geschlechterforschung-diversitaet/non-binary-universities/non-binary-uni-accessible-300ppi.pdf
AT	Academy of Fine Arts Vienna: Non-Binary Universities.	Vademecum for Gender Equitable Universities.	https://www.akbild.ac.at/de/universitaet/frauenfoerderung-geschlechterforschung-diversitaet/non-binary-universities/NonBinaryUniversitiesVADEMEKUM_AkademiederbildendenKunsteWien_2019.pdf
BE	Wetenschap=M+V+X	The Young Academy created a toolbox for gender equality available to all higher education institutions: The Young Academy wants to make students and academics aware of the existence of these unconscious biases and their impact on the (academic) career with a particular focus on women academics. On the website they share facts and figures, offer real life examples of how bias leads to gender inequality and practical tools on what can be done. This is related to the Gender Charter that the Young Academy demanded all universities in Flanders to sign.	https://www.jongeademie.be/nieuws/campagne-wetenschapmvx
FR	Égalité hommes-femmes : des leviers pour agir dans votre entreprise (Gender	Professional equality between women and men is far from being achieved: salaries, status, working conditions, sharing of tasks and responsibilities, stereotypes...	https://www.bpifrance-universite.fr/formation/egalite-hommes-femmes-des-leviers-pour-agir-dans-

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	equality: levers for action in your company)	How far do we still have to go? What are the contributions of the Equality Index and the Rixain law in this area? And what levers are available to you to take concrete action in your company, as a manager?	votre-entreprise/
NL	Training Selecteren zonder vooroordelen (Selection without prejudice), College Rechten van de Mens	Training on how to mitigate conscious and unconscious bias in recruitment and selection.	https://www.mensenrechten.nl/voorlichting/training/selecteren-zonder-vooroordelen
NL	Toolboxen Inclusie bevorderen en arbeidsmarktdiscriminatie voorkomen (stimulate inclusion and prevent labor market discrimination). KIS (knowledge platform Inclusive Society)	Geared to HRM programs to familiarize students HR with ways to facilitate inclusion and prevent discrimination	https://www.kis.nl/artikel/toolboxen-inclusie-bevorderen-en-arbeidsmarktdiscriminatie-voorkomen

7 Conclusions

In conclusion, progress toward GE in R&I in the Central West country cluster can be observed. However, amongst others, challenges remain in the areas of data collection and monitoring, as well as in including a gender dimension into R&I content and adopting an intersectional approach. There are also differences observable across the different types of R&I organisation.

According to national experts, all countries in the Central West cluster have reached an adequate level of development in **initiating change** in their legal and policy framework. Austria, Germany and Luxembourg are considered to have made adequate progress in **sustaining and deepening change**, while Belgium, France and the Netherlands are regarded as trailing behind. In addition, engaged stakeholders (e.g. policy makers) and Communities of Practice in tendency seem to be more active in the areas of initiating and sustaining change than in monitoring, intersectionality or gendered innovations. A comparable picture can be found in the areas of the provided national literature and knowledge.

While there is growing recognition of the importance of **intersectionality**, it is an area where further attention is required. The adoption of an intersectional perspective in the legal/policy framework is perceived as inadequate in most countries and the assessment reveals insufficient knowledge on intersectionality across all countries in the cluster. Therefore, policymakers, RFOs, HEIs, other RPOs and R&I companies should prioritise considering other diversity dimensions in their initiatives and activities in intersecting ways. There is also a lack of legal and policy frameworks, meaning that neither political entities such as ministries nor RFOs require the adoption of intersectional perspectives. In sum, there is limited knowledge and awareness of intersectionality, inadequate institutional commitment and a lack of binding regulations and target goals as the adoption is voluntary in nature as well as a lack of data monitoring in areas other than gender. However, there are some funding lines integrating intersectionality into research content.

Gendered Innovation is another crucial aspect of promoting GE in R&I. Efforts are being made to foster gendered innovations, but more work is needed to fully integrate this approach into practice. So far, only Austria and Luxembourg are considered to have adequate gendered innovation policies, while other countries have an insufficient framework and knowledge in this area. Especially regarding gendered innovations in private R&I companies there is limited advancement as gendered innovation policies focus mainly on RFOs and other RPOs. RFOs can implement gender criteria within their funding programmes and provide guidelines to applicants.

Challenges also remain regarding **data collection and monitoring** although some advancements have been made. In Austria, Germany and France, legislation, guidelines, and/or working groups have facilitated data collection and the monitoring. However, inconsistencies, limited accessibility and the exclusion of diverse indicators still hinder comprehensive data collection and while there has been progress in monitoring effects in HEIs and some RPOs, private R&I companies' monitoring is still rather limited and they rarely provide relevant data on GE as monitoring is often voluntary. Nevertheless, there seems to be a trend towards including more diverse indicators (e.g. Austria), even if gender beyond the binary is still neglected. In sum, continuous efforts are required to address challenges, improve

data collection, ensure data transparency and accessibility, set standards, foster inclusivity (e.g. by providing “intersectional data”) in data monitoring and expand monitoring efforts to include a broader range of organisations within the R&I sector across countries.

When comparing the **different types of R&I organisations**, it seems that there is most knowledge available on HEIs, while there seem to be gaps in knowledge especially with regard to NGOs. In comparison, HEIs also seem to be the type of R&I organisation that have most frequently implemented GEPs. In the Central West cluster, however, RFOs are only close behind. Even though GEPs seem to be more widespread with HEIs and RFOs, these two types of R&I organisations are still considered relative newcomers to GEPs in many countries of the cluster. HEIs and private companies seem to use alternative instruments rather than GEPs (e.g. diversity and inclusion plans) in many countries.

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Annex. Complementary tables

Table 13. Literature from the national experts, by country	
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Table 14. Legal changes since the GEAR tool update, by country

Country	Legal changes
Belgium	• Wallonia-Brussels: Decree 'Paysage' https://www.gallilex.cfwb.be/document/pdf/39681_060.pdf
France	• Modification to the Labour Code: Loi n°2018-771 du 5 septembre 2018, https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000037367660/ • legislation regarding civil service/public sector: loi n° 2019-828 du 6 août 2019, https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000038889182/ ; Décret n° 2020-528 du 4 mai 2020, https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000041853744/ ; Décret n° 2020-256 du 13 mars 2020, https://www.legifrance.gouv.fr/loda/id/JORFTEXT000041722970/ • Higher Education and Research law: Loi n° 2020-1674 du 24 décembre 2020, https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000042738027 • for the private sector: Loi n° 2021-1774 du 24 décembre 2021, known as Rixain law, https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000044559192

Germany	<ul style="list-style-type: none"> • General Equal Treatment Act (AGG) (2006) https://www.antidiskriminierungsstelle.de/EN/about-discrimination/order-and-law/general-equal-treatment-act/general-equal-treatment-act-node.html • legislation regarding boards in private sector (2021): https://www.dw.com/en/german-cabinet-approves-gender-quota-bill-for-company-boards/a-56144530 • Federal Foundation for Gender Equality (approved 2021): https://www.bundestag.de/dokumente/textarchiv/2021/kw15-de-bundesstiftung-gleichstellung-830888 https://www.bundestag.de/dokumente/textarchiv/2021/kw15-de-bundesstiftung-gleichstellung-830888 https://www.bundestag.de/dokumente/textarchiv/2021/kw15-de-bundesstiftung-gleichstellung-830888 • amendments of Higher Education Acts in numerous German states (e.g., Bavaria, Lower Saxony or Berlin)
Netherlands	<ul style="list-style-type: none"> • law on equal representation in boards of directors and supervisory boards (2022): https://zoek.officielebekendmakingen.nl/stb-2021-495.pdf

Table 15. Suggestions Communities of Practice

Topic	Suggestions
Initiating change	<ul style="list-style-type: none"> • BE: Evidence-based toolkit to convince top management in public and private R&I of the importance of gender equality within their institutions • DE: How bridge from gender equality to diversity/intersectionality • LU: cross-collaboration among R&I organizations and companies working on R&D (exchange about potential collaborations and joint initiatives), as well as researchers working on GE • NL: social safety (or rather avoiding sexism and racism)
Sustaining change	<ul style="list-style-type: none"> • BE: Need to go beyond the discussion of gender bias, more attention to structural gender impediments looking into organisational structures and culture • LU: cultural differences that might affect gender equality in R&I organizations; • LU: in general: more visibility of the existing working groups and initiatives within R&I organizations • LU: practical implementation of aims (of GEPs) • NL: leadership of EDI, dealing with resistance
Intersectional approach	<ul style="list-style-type: none"> • BE: a framework that makes intersectionality 'accessible' is necessary (practitioners often have a hard time understanding how to implement an intersectional approach without losing sight of the core aim of equality; intersectionality often means complexity) • DE: How bridge from gender equality to diversity/intersectionality (practices and policies) • LU: Inclusion of the LGBTQIA+ community; their needs and challenges in R&I organizations • NL: how to make policies and practices intersectional
Gendered innovations	<ul style="list-style-type: none"> • AT: Digitalization and Equal Opportunities • BE: promote an intersectional gender analysis into all R&I services • LU: Raise awareness about gendered innovations and what it actually means in general
Monitoring	<ul style="list-style-type: none"> • BE: Development of a procedure for transparent, clear and standardized monitoring. Especially introducing an intersectional lens is particularly necessary in Belgium, but is tied to the difficulty of collecting "equality data"

that is standardized across all R&I institutions. So need for development of clear definitions on not only gender, but in particular also ethnicity and race.

- LU: Distribution/sharing/wider discussion of the already existing good knowledge on gender equality in Luxembourg
 - NL: effective monitoring
-

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INSPIRE

D2.2 Southern country cluster report

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Lorena Pajares (Notus)
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Fraunhofer	Fraunhofer Gesellschaft zur Forderung der Angewandten Forschung EV, Germany
UH	Universiteit Hasselt, Belgium
ZRC SAZU	Znanstvenoraziskovalni Center Slovenske Akademije Znanosti In Umetnosti, Slovenia
GESIS	GESIS-Leibniz-Institut für Sozialwissenschaften EV, Germany
INNO	Innosystems Symvouleutikes Ypiresies Kai Efarmoges Pliroforikis Ypsilis Technologias Monoprosopi Idiotiki Kefalaiouchiki Etaireia, Greece

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List of Acronyms

CCR	Country Cluster Report
CoP	Community of Practice
EC	European Commission
EDI	Equality, Diversity and Inclusion
EIGE	European Institute for Gender Equality
ERA	European Research Area
GEADC	Gender Equality and Anti-discrimination Committees (Greece)
GEAR	Gender Equality in Academia and Research
GEP	Gender Equality Plan
HEI	Higher Education Institution
HR	Human Resources
HRS4R	Human Resources Strategy for Researchers
ICT	Information and communications technology
NAP	National Action Plan
NGO	Non-governmental organisation
PAP	Positive Action Plan (Italy)
RFO	Research funding organisation
RPO	Research performing organisation
R&I	Research and Innovation
SDG	Sustainable development goals



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1 Introduction

This is one of the four country cluster reports which analyse the results of the expert survey conducted by INSPIRE, a Horizon Europe project aimed at building a sustainable centre of excellence on inclusive gender equality in research and innovation (R&I).

INSPIRE survey

The survey involved one expert in each EU27 Member State and provided crucial support to the INSPIRE research programme on structural change towards inclusive gender equality in R&I, through:

- collecting information and analysis on policy developments and research debates at the national level; and
- identifying engaged stakeholders, other potential experts and relevant resources in the country, as well as collecting suggestions to support existing or potential initiatives for developing new communities of practices (CoPs).

The information collected was also meant to be a useful resource for the R&I ecosystem in Europe and beyond, including policy makers, researchers and equality practitioners across Europe.

The survey focused on **structural change towards inclusive gender equality in R&I organisations** in the country, defined as a long-term, sustainable process aimed at building an institutional environment (values, norms, structures and procedures) in which inclusive gender equality is widely discussed and explicitly embraced in organisational and individuals' practices having a demonstrable impact on reducing gender and other axes of inequality and discrimination within the organisation.

A **Gender Equality Plan (GEP)** is an **instrument** to institutionalise a gender equality policy and implement a structural change process. In the survey, GEP was defined according to the eligibility criterion and minimum requirements established by the European Commission to participate in Horizon Europe. Organisations may adopt similar/equivalent instruments to implement structural change or alternative instruments. These **alternative instruments** may focus only on gender or be interventions that fall under the umbrella of Equality, Diversity, Inclusion (EDI) policies, or just diversity policies.

The survey addressed **five topics** of interest related to structural change:

- **Initiating change:** How organisations can be encouraged to adopt a gender equality policy (GEPs and equivalent/alternative measures) based on local knowledge, experience and change movements as well as evidence-based tools (e.g., gender equality audit).
- **Sustaining and deepening change:** How organisations can address resistances and sustain and deepen change by building institutional gender competence, dedicating resources and structures, promoting evidence-based measures and broadening the scope of intervention (e.g., integrating sex/gender analysis in curricula or research content; implementing a sexual harassment protocol).



- Adopting an **intersectional approach**: How organisations can move from GEPs and/or EDI interventions to inclusive intersectional GEPs fostering change towards equality.
- Implementing **gendered innovations**: How innovation clusters and private R&I companies can be encouraged to implement gendered innovations - that is to innovate by integrating methods of sex and gender analysis into their R&I products or services, ideally taking into account also other axes of inequality and discrimination.
- **Monitoring inclusive gender equality**: How organisations can support an evidence-based inclusive gender equality by implementing effective monitoring conceptual approaches, tools and indicators - in particular in the four topics identified above (initiating change; sustaining and deepening change; adopting an intersectional approach; implementing gendered innovations).

The survey addressed structural change in **all types of R&I organisations**:

- Research funding organisations (e.g. research Ministries and public bodies funding basic and applied research; innovation agencies; other public and private institutions funding research and/or innovation).
- Research performing organisations:
 - Higher education institutions (public and private)
 - Other public research performing organisations (publicly funded research institutes)
 - R&I companies (e.g., private companies providing R&I products or services)
 - NGOs and other non-profit research performing organisations (e.g., private R&I foundations)

Country cluster report

The comparative analysis of the survey was conducted in four country cluster reports: North West countries, Central West countries, Southern countries and Central East and Eastern countries.

The Southern country cluster report analyses the results of the survey in six countries: **Cyprus, Greece, Italy, Malta, Portugal, and Spain**. The information used to elaborate this report was collated by the following experts:

- Cyprus Alexia Panayiotou
- Greece Dia Anagnostou
- Italy Lucio Pisacane
- Malta Anamaria Magri Pantea
- Portugal Catarina Sales Oliveira
- Spain Lorena Pajares and Maria Caprile¹

For further details regarding the methodology followed to collect the information and elaborate this report, please refer to the Methodological Annex.

¹ The experts from Spain are affiliated to Notus, an institution member of the INSPIRE consortium.



2 Legal and policy framework

The Gender Equality in Academia and Research (GEAR) tool, elaborated by the European Institute for Gender Equality (EIGE) provides an overview of the legal and policy frameworks in relation to gender equality in R&I in all Member States until 2021. The INSPIRE survey asked national experts to revise this overview and identify changes in the legal and policy framework since 2021. In addition, the survey included specific questions on three aspects of special interest for INSPIRE: non-discrimination legislation, intersectional policies, and policies on gendered innovations in the private sector. Finally, the experts were asked to provide an overall assessment of the current legal and policy framework in their countries. Accordingly, this chapter is structured in three sections: legal framework, policy framework and overall assessment.

2.1 Legal Framework

2.1.1 Gender equality in R&I

The GEAR tool indicated clear differences between the Southern countries with regard the legal framework on gender equality in R&I in 2021. It was considered precise and comprehensive in Spain, and several legal provisions were identified in Italy and Greece. However, there were no laws or regulations explicitly promoting gender equality in R&I in Cyprus, Malta and Portugal as of August 2021 (although other statutory provisions aimed at preventing discrimination on the grounds of sex and promoting gender equality may be important for R&I).

Since then, changes in the legal framework have not altered substantially such differences. Spain and Greece have implemented changes in the R&I legal framework and Cyprus has changed other statutory provisions which are expected to have an important impact on R&I. In the other countries (Italy, Malta and Portugal) no relevant legal changes were identified. As While changes in Spain, Greece and Cyprus are diverse, a common feature is that tackling sexual harassment and gender-based violence is receiving increasing attention.

Spain

In Spain, the legal framework relies on the 2007 Organic Law for Effective Equality between Women and Men (3/2007), which introduced gender equality as a basic principle for public action and made it compulsory for institutions and companies with more than 250 employees to adopt and implement GEPs. The Law 4/2007 on Universities and the Law 14/2011 on Science, Technology and Innovation further developed gender equality as a basic principle applicable to universities and R&I organisations: universities were asked to create gender equality units; the mandate to adopt GEPs was extended to all public R&I organisations; a general equality target (40%-60%) between men and women was established in nominations to panels, advisory boards and committees; provisions also seek to revise criteria and procedures for recruitment accreditation and promotion, and integrate gender in higher education curricula and research. In 2019 and 2020, different decrees further developed these aspects: the mandate to adopt a GEP was extended to institutions and companies with more than 50 employees, and the minimum content of a GEP was established. One of the minimum requirements is to develop a detailed initial gender diagnosis as a baseline. This diagnosis has



to collect comprehensive sex-disaggregated data, including remuneration, to identify potential gender discrimination.

The **new Law 17/2022 on Science, Technology and Innovation** (which modifies Law 4/11) reinforces gender mainstreaming and is expected to have a positive impact on gender equality in R&I in Spain. This law has three main objectives: 1) supporting R&I careers, especially in the early stages which are characterized by lack of stability, low pay and poor career prospects; 2) updating the regulation of knowledge transfer and innovation; 3) improving governance mechanisms and collaboration between the different R&I actors, both public and private. The law states explicitly that these three objectives will contribute to respond to the main gender inequalities that persist in R&I. To ensure equality for women and men in R&I careers, a central aspect is the set of measures that will be implemented to improve working conditions, retain researchers and support their professional development, combined with specific measures for achieving a presence of at least 40% of women in all areas and prevent that women abandon their R&I careers more than their fellow colleagues, progress more slowly or face more barriers to receive funding or access the highest positions. The law also strengthens institutional transformation in R&I organisations to guarantee "egalitarian, diverse, inclusive and safe working environments wherever science and research is carried out, preventing and eradicating any situation of direct or indirect discrimination". Among other aspects, the law established the obligation of adopt protocols against sexual harassment and gender-based harassment in public R&I organisations, which will be monitored on an annual basis. Institutional transformation is also strengthened in relation to the integration of sex/gender analysis in the content and evaluation of R&I projects. In particular, the law encourages the integration of gender experts in the evaluation bodies or advice by specialists, and establishes that specific guidance on equality, gender bias and integration of the gender dimension in the content of the R&I projects will be provided for the evaluation staff, as well as wider guidance through dissemination of guides or manuals.

Greece

In Greece, Law 4589/2019 established the Gender Equality and Anti-discrimination Committees (GEADC) as consultative bodies in universities. Their mission is to promote gender equality and to tackle discrimination on the basis of gender, racial or ethnic origin, religion, disability, age and sexual orientation at all levels of academic life; and to prevent and combat sexism, sexual harassment and any kind of harmful behaviors. The GEADC is composed by unpaid members who participate voluntarily in different activities, including the development of GEPs.

The **new Law 4957/2022 'New horizons in higher education institutions'** includes several provisions for gender equality: 1) Article 218 refers anew to the GEADC and for the first time, states that the GEADC may be supported by a unit/office within the university for implementing a GEP. The law does not make it compulsory to establish such a unit. However, a working group set up by the Network of Gender Equality Committees of Greek Universities has drafted a guide on the role and responsibilities of equality units to support all those universities that seek to establish such a unit; 2) Article 177 on 'disciplinary offenses' defines the breaching of gender equality, equal opportunities between men and women, and discrimination on the basis of sex, race or ethnicity, religion, disability, age, family or social condition, sexual orientation or gender identity, as well as sexual harassment and the use of sexist language, as disciplinary



offenses which can result in significant punitive measures for their perpetrators; 3) Art. 386 mentions that the Council of Assessment and Certification can assess universities' teaching and research activities, including in regard to gender equality and access of people with disability.

The **new Law 5019/2023** included provisions for the promotion of R&I which are important for equality. Central among these is the establishment – for the first time – of GEADCs in research and technology organisations. These GEADCs have the same mission as in the universities. Their work may be supported by the creation of a unit or office within each organisation, namely for implementing GEPs.

Finally, a **ministerial decision** (DIDAD/F.64/946/OIK. 858, FEK no. 343, 26 January 2023) on 'prevention and combatting of violence and harassment at work in public organisations' recognises sexual harassment, a hostile work environment and harmful behavior linked to sexual orientation or gender identity as main forms of harassment. Victims of such behaviors can bring complaints to competent bodies within and outside the public organisation in which they are employed.

Cyprus

In Cyprus there have not been specific legal changes in the field of gender equality in R&I. However, changes in other statutory provisions may potentially have an impact as they contribute to raise awareness of the importance of gender equality and show a willingness on behalf of the government and the legislative body to take gender equality measures into serious consideration. The most relevant change is the **amendment to the Law 'on the prevention and handling of violence against women and interfamilial violence'**, adopted in July 2022². The amendment seeks to better adhere to the Istanbul Convention and includes a specific reference to 'femicide' (with a life prison sentence). This builds on recent legal developments, namely Law N. 209(1)/2020 which defined sexism in all its forms, including online sexism and made it illegal as criminal act punishable by one year imprisonment and/or fine. The Attorney General of the Republic is responsible for prosecuting these offenses³.

2.1.2 Non-discrimination

National experts were asked to identify the legally enshrined protected characteristics from which discrimination is prohibited, on the basis of the 2022 country reports on non-discrimination⁴ elaborated by the European network of legal experts in gender equality and non-discrimination. These reports focus on the transposition and implementation at national level of the Council Directives 2000/78 (Equality Framework Directive) and 2000/43 (Race Equality Directive), which regulate the principle of non-discrimination in the EU and explicitly

² The amendment was proposed by DiSy MP Annita Demetriou, Speaker of the House of Representatives. The report in English is available at: <https://cna.org.cy/en/article/3539193/cyprus-parliament-makes-femicide-a-distinct-crime>

³ The report in English is available at: <https://knews.kathimerini.com.cy/en/news/parliament-passes-bills-tackling-sexism-bullying-at-schools>

⁴ <https://www.equalitylaw.eu>



refer to direct and indirect discrimination based on **sex, disability, sexual orientation, racial or ethnic origin, religion or belief, and age**.

In all Southern countries the principle of non-discrimination is legally enshrined in the Constitution and developed in general and specific legislation that has transposed the Council Directives, has been established in accordance to the international conventions ratified by each country, or aims to further protect certain characteristics.

The introduction of **gender identity, gender expression or sex characteristics** as new protected grounds is an important feature. Legislation addressing these aspects has been adopted in Malta (2015), Greece (2016), Portugal (2018) and Spain (2023). In Malta, the Equality for Men and Women Act of 2003 was amended through the Gender Identity, Gender Expression and Sex Characteristics Act of 2015 that introduced sexual orientation, gender identity, gender expression and sex characteristics as protected grounds. In Greece, Law 4443/2016 transposed anew Directives 2000/78 and 2000/43 and it prohibits any direct or indirect discrimination, inter alia, on the ground of gender identity or characteristics. In Portugal, Law 38/2018 regulated the right to self-determination of gender identity and gender expression and protection of sexual characteristics. Prohibition on discrimination on these grounds has been developed in several laws, including the Labour Code and the Criminal Code. In Spain, the 'Law for the real and effective equality of trans people and for the guarantee of LGTBI rights' was approved in February 2023. It was passed despite strong criticism from feminist groups, which consider that this law collides with all legislation regulating (biological) sex as a protected characteristic.

2.2 Policy Framework

2.2.1 Gender equality in R&I

Since 2021, Cyprus, Greece, Italy and Malta have implemented changes in the policy framework regarding gender equality in R&I.

In **Cyprus** and **Greece** there has not been any explicit government policy to promote gender equality in higher education and publicly funded research. However, experts flag the **adoption of GEPs in most universities and public research organisations** as a crucial policy change. The new Horizon Europe GEP eligibility criterion is seen as the most important driver for change in Cyprus, while change in Greece is also driven by bottom-up pressure and the new gender equality provisions for universities approved in 2022. The Greek expert highlights that in fact, these provisions were only introduced following advocacy and pressure from the equality committees (GEADC) of universities and non-governmental organisations like the Greek Association of University Women (ELEGYP).

Also in Greece, a new policy initiative was implemented to **promote women's participation in innovation**. In 2022, the Minister of Labor and Social Affairs announced the creation of the **Greek Innovation Lab for Women** (#GIL4W⁵) to strengthen the participation of girls and women in STEM fields and in R&I, and to promote female entrepreneurship. Its establishment was based on relevant initiatives and collaboration between this Ministry, leading key actors

⁵ <https://gil4w.eu>



of the Greek innovation ecosystem and the European Centre for Women and Technology (ECWT) based in Oslo, Norway. It was also supported by the EC DG Grow and DG Connect, the Norwegian Ministry of Foreign Affairs, and the EEA & Norway Grants. To support the operation of #GIL4W, a unit was established within the ATHENA R&I center with a consortium of twenty partners (ministries, research centers, academic institutions and private enterprises). Its members are encouraged to commit themselves to a gender-responsive approach to innovation, to include women as service and innovation providers and users, to evaluate gender impacts, and to provide sustainable solutions to meet the needs of women and girls. It intends to become the leading Greek ecosystem to adopt a gender – sensitive approach to innovation and entrepreneurship, integrating the female talent into the sustainable, green and digital post-Covid recovery of the Greek economy. However, as highlighted by the Greek expert, it remains to be seen the extent to which this important initiative will take off and transform into action. In contrast, the new National Strategy of Smart Specialization 2021-2027 adopted by the Ministry of Development and Investments does not at all mention gender, women or equality.

In **Italy**, the **National Recovery and Resilience Plan (PNRR)** within the Next Generation EU programme foresees funding for R&I, from PhDs to Research Fellow or fixed-term contracts. Among the PNRR's streams of intervention is the cross-cutting priority 'Women and Youth', which provides for the recruitment of at least 30% women and/or youth (under 35 years old) in each call for proposals, including R&I. However, as stated by the Italian expert, there are two main problems: the proposed contracts are fixed-term contracts, and there is no legislative indication for the continuation of the contract when the funding expires; many calls for proposals do not mention the clause for recruitment of at least 30% women and youth.

Relevant policy developments are also identified in **Malta**. In January 2021 the Malta's **Research and Innovation Smart Specialisation Strategy (RIS3) 2021-2027** was adopted, with gender equality and inclusiveness as one of guiding principles of its vision and implementation. It specifically provides that “any form of implementation mechanism needs to ensure that there are no barriers preventing equal access to and participation by all, and that all research and innovation output is gender mainstreamed”. In December 2022, the Malta Council for Science and Technology launched the **draft National R&I Strategic Plan 2023 – 2027** for public consultation. Following its close on 31 January 2023, this strategic plan has been reviewed and presented for political endorsement, with final official launch expected in 2023. Compared to the previous National R&I Strategy 2020, the new strategy includes new gender mainstreaming actions, as the introduction of a national certification scheme for GEPs in RPOs and the set-up of a dedicated structure for gender mainstreaming in R&I, both under the responsibility of the Ministries responsible for R&I and Equality. There are also two specific performance indicators and targets set, specifically a minimum of 40% of key roles and decisions making structures in R&I held by women, and minimum of 40% female evaluators or peer reviewers of publicly funded R&I programmes. Finally, in November 2022, the national **Gender Equality Mainstreaming Strategy and Action Plan** was launched. It does not make explicit references to R&I, but includes specific actions for increasing women participation in STEM careers (e.g. promotion and awareness raising; various training, education and learning opportunities; mentoring, apprenticeship and career counselling; fiscal and financial incentives; data collection and statistical system to monitor participation, employment tenure and progression, entrepreneurship, access to finance, pay gap and root causes; gender



equality audits in all schools and higher education institutions; ensuring necessary resources for gender equality mainstreaming are made available throughout the educational system and in STEM facilities; STEM teachers training in gender-responsive pedagogy).

2.2.2 Intersectionality

There is growing consensus across disciplines that an intersectional approach is necessary to capture and address the emergence and reproduction of inequalities, which often involve combinations of multiple social identities including sex, gender, class, race, ethnicity, cultural background, age, sexual orientation, health and disability (among other) which cannot be easily disentangled. Building on this, the survey asked national experts to identify R&I policies in place in their countries that explicitly build on an intersectional approach to foster equality.

The explicit adoption of an intersectional approach is present in most countries, either in R&I policies (Portugal and Spain) or in equality policies which impact in R&I (Greece and Malta). However, the adoption of such approach is rather new and it is stated in general terms in laws and policy documents. Accordingly, it remains to be seen how it will be implemented.

In **Portugal**, the **National Strategy for Equality and Non-Discrimination 2018-2030** (Portugal + Igual - ENIND) was launched in 2018 at the start of a new programmatic cycle and is aligned with the 2030 Agenda for Sustainable Development. It is supported by three action plans: 1) Action Plan for Equality between Women and Men; 2) Action Plan to Prevent and Combat Violence Against Women and Domestic Violence; and 3) Action Plan to Combat Discrimination on the basis of Sexual Orientation, Gender Identity and Expression, and Sexual Characteristics. ENIND is the main gender equality policy at national level to consolidate progress and plan future government action. It is formally coordinated by the Commission for Citizenship and Gender Equality (CIG) and supported by technical commissions created to monitor the three operational action plans. For the first time, ENIND addresses gender equality in higher education and R&I. Intersectionality is embedded in ENIND. This strategy aims to tackle broadly gender discrimination and to address the situations, actors and contexts where gender-based discrimination and inequality intersects with other axes of discrimination and inequality.

In **Spain** the new **Law 17/2022 on Science, Technology and Innovation** calls for an intersectional approach both in the design of gender equality policies and in the content of research and knowledge transfer. The law states that "the public agents of the system of science, technology and innovation will implement measures to promote and guarantee diverse, inclusive and safe working environments, as well as egalitarian ones, and will take measures to prevent, detect early on and eradicate any direct or indirect discrimination, such as measures to integrate intersectionality both in the design of gender equality policies in science and innovation and in the content of research and knowledge transfer, specific studies and research in these areas, or monitoring and evaluation of the initiatives that address these aspects, as well as their impact on correcting the inequalities detected."

In **Greece** there are no R&I policies that explicitly build on an intersectional approach to foster equality. Yet, such approach has been incorporated in Greek anti-discrimination legislation and it could be indirectly be brought to bear upon R&I policies. In particular, **Law 4604/2019 on 'Promotion of substantive equality between the sexes, prevention and combatting of**



gender-based violence' for the first time introduces the notions of multiple and intersectional inequalities and defines 'multiple discrimination': “any act or omission that places persons in an inferior position on the grounds of sex, sexual harassment and gender identity, in combination with one or more other characteristics, in particular national/ethnic or social origin, age, family status, disability, religious, political or other belief”. The law also calls for adopting an intersectional approach in the design of policies to combat discrimination.

In **Malta**, the **Gender Equality Mainstreaming Strategy and Action Plan** launched in 2022 aims not just for the systematic inclusion of a gender perspective in all areas and phases of policy-making, but also calls for adopting an intersectional approach. Specifically, the consideration of gender in combination with other personal characteristics or identities (e.g. disability, race, belief, age, sexual orientation), particularly of persons at risk of poverty and social exclusion. Such intersectional approach is explicitly adopted in the **GEP of the University of Malta**, the main public higher education and research organisation in the country. The Gender+ Equity Plan of the University of Malta, approved in 2022 focuses explicitly on intersectionality from the start. It is titled “Action plan for equity, diversity and inclusion 2022-2025” and aims to support students and employees with protected characteristics such as gender, age, belief, creed or religion, colour, ethnic or national origin, race, disability, family responsibilities or pregnancy, family or civil status, gender expression or gender identity, genetic features, health status, language, nationality, political opinion, property, sex or sex characteristics, sexual orientation, and social origin.

In Cyprus and Italy, there are no policies which explicitly refer to intersectionality. However, the Italian expert highlights that **Italy's National Strategy for Gender Equality** adopts implicitly such approach. This strategy was issued by the Department for Equal Opportunities in 2021 and introduced a new comprehensive and systematic approach for achieving gender equality goals, based on the European Gender Equality Strategy and EIGE's Gender Equality Index. Intersectionality has been embedded in the ex-ante evaluation and the definition of indicators, targets, cross-cutting and sectoral measures on policy areas such as work, income, skills, time, and power.

2.2.3 Gendered innovations

The survey asked experts to identify R&I policies that foster private companies and/or other R&I organisations to take into account gender in their R&I products or services.

In **Spain** these policies have been in place for some years. The integration of gender analysis in research was one of the priorities of the State Roadmap Spanish for the development of the European Research Area 2016-2020 and one of the guiding principles of the Strategy for Science Technology and Innovation in 2013-2020 and in 2021-2027. However, there has been a lack of concrete measures to effectively implement these policies. The **new Law 17/2022 on Science, Technology and Innovation** includes further measures to foster the integration of sex/gender analysis in the content and in the evaluation of R&I projects, both for public and private organisations. Specific guidance on equality, gender bias and integration of the gender dimension in the content of the R&I projects will be provided for the evaluation staff, as well as wider guidance through dissemination of guides or manuals. To properly evaluate the gender dimension, the law also calls for including gender experts in the evaluation panels, or seeking advice from gender specialists.



In **Malta** the **draft National R&I Strategic Plan 2023 – 2027** is foreseen to include measures that, albeit not explicitly, may encourage private companies to take into account gender in their R&I products or services. Namely, this plan will foster the adoption of GEPs in private R&I companies, including the integration of the gender perspective in R&I content.

Policies to foster gendered innovations in the private sector are not in place in Cyprus, Greece, Italy and Portugal. Certifications and awards aimed at raising gender awareness and encouraging private companies to adopt gender equality policies (e.g., the Employer Equality Certification⁶ in Cyprus; the Gender Equality Certification System⁷ in Italy) do not include the integration of the gender dimension in products or services.

2.3 Assessment of current legal and policy framework

The survey asked national experts to provide an overall assessment of the current legal and political framework in their countries. The exact question was: Is it adequate to foster or sustain significant advances in the field of (inclusive) gender equality in R&I organisations? Experts were asked to reply to this question for each topic, using a 4-scale ranging from 'highly adequate' to 'highly insufficient'. Results are presented in Table 1.

As a **general trend across countries**, the survey indicates clearly that the legal and policy framework is more adequate to support R&I organisations to initiate change than to sustain and deepen change, including addressing any of the other topics. Lack of legal and policy measures is especially acute in the two topics that have been flagged more recently in EU research and policy debates: adopting an intersectional approach and implementing gendered innovations in the private sector. However, in spite of broad consensus over decades that institutional policies have to rely on evidence to initiate or sustain structural change, the survey also indicates that more supportive legal and policy measures are needed to foster monitoring and evaluation in R&I organisations.

The survey also shows important **differences between countries**. Spain and Portugal are the countries where the legal and policy framework is better assessed (highly adequate for initiating change and adequate for sustaining change). In contrast, lack of adequate legal and policy measures is especially marked in Cyprus and Italy (the legal and policy framework is considered insufficient even for initiating change). While Greece and Malta present intermediate levels of adequacy, it is worth noting that Malta is the only country in which measures to support monitoring and evaluation are assessed as adequate - in the rest of countries these measures are considered insufficient or highly insufficient.

Table 1. Assessment of national legal and political framework, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality

⁶ https://www.mlsi.gov.cy/mlsi/dlr/dlr.nsf/nationalcertificationbody_en/nationalcertificationbody_en

⁷ <https://certificazione.pariopportunita.gov.it/public/che-cosa-e>



Cyprus	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Greece	Adequate	Highly insufficient	Highly insufficient	Highly insufficient	Insufficient
Italy	Insufficient	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Malta	Adequate	Adequate	Insufficient	Insufficient	Adequate
Portugal	Highly adequate	Adequate	Insufficient	Insufficient	Insufficient
Spain	Highly adequate	Adequate	Highly insufficient	Insufficient	Insufficient



3 Structural change

Overview of GEP uptake

The extent of GEPs uptake has been assessed by national experts based on available literature and evidence. It is clearly most pronounced in HEIs: in all countries except Malta, most or many universities have GEPs. It is also important to note that in all countries the uptake of GEPs is higher in HEIs and public organisations than in private or non-profit organisations. This is the result of legal and policies measures developed over time in countries such as Spain, Greece and Italy, as well as the Horizon Europe eligibility criterion. Of the six Southern countries, Spain has the most widespread use of GEPs in all types of R&I organisations, a consequence of Spanish' development of legal and policy measures since 2007. A summary overview of the prevalence of GEPs by type of R&I organisations is given in Table 2.

Table 2. Degree of uptake of GEPs in the country, by type of R&I organisation					
Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Cyprus	Most or many have GEPs	Most or many have GEPs	Some have GEPs	A few or none have GEPs	Some have GEPs
Greece	Some have GEPs	Most or many have GEPs	Some have GEPs	A few or none have GEPs	Some have GEPs
Italy	Some have GEPs	Most or many have GEPs	Some have GEPs	A few or none have GEPs	n.a.
Malta	Most or many have GEPs	Some have GEPs	Most or many have GEPs	n.a.	n.a.
Portugal	Some have GEPs	Most or many have GEPs	Some have GEPs	A few or none have GEPs	A few or none have GEPs
Spain	Most or many have GEPs	Most or many have GEPs	Most or many have GEPs	Some have GEPs	Some have GEPs

Complementarily to the prevalence of GEPs, it is of interest analysing the types of R&I organisations which, in view of the national experts are relative **'newcomers'** regarding GEP implementation (see Table 3). It is the case of private companies and non-profit organisations in all countries. In contrast, HEIs are the institutions with best consolidated practice (except in Cyprus where most universities have adopted GEPs recently, and likely in Malta, where there is no reliable information available to the expert's knowledge). The situation in RFOs and public RPOs is more mixed.

Table 3. Relative "newcomers" with regard to implementing a GEP in the country, by type of R&I organisation					
Country	Research funding organisations	Higher education institutions	Other public research performing	Private companies working on R&I	Non-profit research performing



	organisations			organisations	
Cyprus	No	Yes	Yes	n.a.	Yes
Greece	Yes	No	Yes	n.a.	Yes
Italy	No	No	No	Yes	n.a.
Malta	No	n.a.	Yes	Yes	Yes
Portugal	Yes	No	Yes	Yes	Yes
Spain	n.a	No	No	Yes	n.a.

It is also worth noting that the implementation of **alternative instruments** to GEPs is widespread in Italy and to a lesser extent in Malta and Portugal. In **Italy**, Legislative Decree 198/2006 on 'Code for Equal Opportunities between Men and Women' established the mandate of adopting a Positive Action Plan (PAP) in the public administration (including public funding organisations, research organisations and universities). The PAP is policy document proposed by the Equality Committee (CUG)⁸ to the Board of Directors. The general PAP objectives, tailored to the organisational context and related to gender issues, concern: guaranteeing equal opportunities in access to employment, career progression, working life, professional training and mobility opportunities; promoting organisational well-being and a better organisation of work that favours balance between work and private life; promoting a gender culture and respect for the principle of non-discrimination within the administration. In **Malta**, EDIs policies are widespread in RFOs, RPOs and HEIs. In **Portugal**, alternative instruments in RFOs and HEIs are the EC's certification HRS4R (Humane Resources Excellence in Research Award) as well as EDI policies.

Socio-cultural, political and economic context

Beyond the legal and policy frameworks analysed in section 2, the socio-cultural, political and economic contexts of the six countries impact the institutionalisation of gender equality in R&I in different ways. In the following, the situation of each country is detailed along with the most significant practical lessons that can be learned. The description starts by Spain, which is the Southern country with the most comprehensive and consolidated legal framework for gender equality in R&I, followed by Italy and Portugal where several legal measures are in place, and ends presenting the situation in Cyprus, Malta and Portugal, where legal measures are lacking.

In **Spain**, the legal context has been decisive for the institutionalisation of gender equality in R&I. Equality Units at HEIs have been created mainly since 2007, when Organic Law 3/2007 for the effective equality of women and men was passed, as well as Organic Law 4/2007, which

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Unique Guarantee Committees for Equal Opportunities in Public Administrations for Workers' Wellbeing and against Discrimination.



modifies Organic Law 6/2001 on Universities, whose text states that "universities will have equality units within their organisational structures for the development of functions related to the principle of equality between women and men". However, the lack of specific regulations on the creation of the Equality Units and the previous existence in many Spanish universities of institutes, seminars, chairs or centres dedicated to feminist or gender studies, as well as the fact that professors-researchers linked to these research institutes have been appointed as directors of the Equality Units, has not helped to differentiate management from research (RUIGEU, 2022).

The social context with a strong and consolidated feminist movement with a networking culture has also been crucial. The university equality policy networks are also partly the result of this context, and have played a fundamental role in clarifying the functions of the Equality Units and in the drive to consolidate the minimum structures. Before the university policy networks on gender equality, the networks of research institutes were born, which were the first structures to promote the value of equality in universities, which built the feminist theoretical corpus nourished by interdisciplinary knowledge, currently constituted in the University Platform for Feminist and Gender Studies (RUIGEU, 2022). This platform serves as gateway for dialogue and interpellation from feminist student associations and other change agents, contributing to the connection of theoretical creation with the reality on the ground. That interpellation has also been important for forcing progress on key issues such as sexual harassment. The socio-cultural context was also relevant -more so than the legal context- for the institutionalisation of gender equality in other RPOs such as the CSIC, which created its Commission for Women and Science in 2002, being a pioneer in Spain in the creation of this type of equality structures (MICIN, 2021).

All in all, despite social and legislative advances, the economic context (especially crises such as the one in 2008, just after the 2007 Law was passed) has served as an excuse for the poor allocation of funds for policy implementation, which has resulted in a much weaker institutionalisation than expected. The Spanish Conference of Rectors identifies as a challenge the amount of public effort over GDP that Spanish society commits to extend the principle of equal opportunities in comparison with the efforts made by countries in the socio-economic environment (CRUE, 2021). Gender equality in R&I is also currently challenged by the policy context, marked by an increased presence of the far-right in regional and local governments in coalition with the main conservative party. Both political parties and the Catholic church are adopting an increasingly belligerent anti-gender discourse. Debates around the self-determination of gender and the protection against sex-based discrimination and inequalities have also resulted in controversies within the centre-left and left parties and social and feminist movements that have been detrimental for co

Some main practical lessons to be learnt are: 1) **Collaboration and networking**: The report made by the Women and Science Unit of the Ministry of Science and Innovation shows the importance for the equality committees of research centres to share their experiences and good practices regarding equality with other committees in the form of networks (MICIN,2021); 2) **Introducing gender criteria to assess excellence**: The Severo Ochoa and María de Maeztu Centres and Units of Excellence programme, funded by the Ministry of Science and Innovation, introduced gender equality criteria in the evaluation process, contributing to a more gender-sensitive understanding of excellence. Institutions aspiring to this prestigious accreditation must demonstrate their commitment to gender equality by implementing specific



measures and policies. For example, the existence of measures aimed at correcting existing gender inequalities in each of the research strata, or measures to promote the integration of sex/gender analysis in the content of research that serve to avoid gender biases are assessed (AEI, 2023); 3) **Bottom-up approach and interdisciplinary initiatives:** The creation of the Gender Equality Nodes Network as part of the SUPERA project at the University Complutense of Madrid shows the importance of working on the basis of voluntary participation from a bottom-up approach (nodes were not handpicked but joined the network out of activism and personal interest, which contributed to ownership and engagement). It also revealed the potential for multiplier impact, being the only network that brought together women researchers from all scientific disciplines at the university. Today, after the project is finished, the Network is still active and with growing presence at the institution (SUPERA, 2022); 4) **Tackling resistances:** In spite that GEPs are a well consolidated practice in HEIs and public RPOs, resistances to gender equality policies are widespread although not always explicit. Recently some institutions have faced serious cases of sexual harassment and these resistances have clearly emerged. The sexual protocol in place has not been properly implemented and corporativism has prevailed, de facto protecting the alleged offender instead of supporting the claimant.

In **Italy**, the socio-cultural context plays a decisive role in the configuration of the R&I scenario: there is still a traditional approach to gender roles (career-oriented male, caregiving female), together with strong gender stereotypes and no balanced time in family responsibilities. This context poses a hindrance to the advancement of the EU gender equality principles and has served as an open gate for the reframing the governmental goals, reshaping the political context as well: in September 2022, Giorgia Meloni, a well-known anti rights campaigner, won the legislative elections, leading to further setbacks. The current far-right government has continued the populist policies of the previous government, which prioritised the value of the protection of the family over the eradication of the discriminations against women (Villa et al., 2021). The former Minister for Family and Disability under the populist government Conte I (formed by Lega and Five Star Movement), openly against LGBT+ families, promoted measures 'to protect' the traditional (heterosexual) family, then considered under attack by liberal and secularized Europe. Hence, also in Italy there was a backlash against gender equality as in other countries (Verloo 2018) due to the rise of the populist radical right party Lega (Donà 2019, Villa et al. 2021) which is now being exacerbated. Since the victory of the far-right party Fratelli d'Italia (Brothers of Italy) and its alliance with rightwing parties, the new Prime Minister Giorgia Meloni, whose motto is 'god, family, fatherland', promotes a nationalist and ultratraditionalist vision of the family and women's place in society. On top of that, other political factors add to the current political arena: there is no national agency for gender equality and the persistence of a welfare system with a familistic and traditional approach (where there is no or minimal support to fatherhood). On the other hand, no data has been reported as to understand if the National Strategy for Gender Equality, issued by the Department for Equal Opportunities of the Italian Presidency of the Council of Minister back in 2021, has yielded any tangible outputs or affected the R&I sector somehow.

All in all, what the current political and social context suggests is a genuine risk of further curtailment of human rights, notably women's, LGBT's, and migrants' rights, making it a particularly challenging context for working on issues such as the adoption of an intersectional approach, where core discrimination grounds like racism or xenophobia are put on the table.



Regarding the economic context, Paola Villa and her team (2021) describe how the Italian university system suffers from poor funding, due to the modest investments traditionally devoted to tertiary education, and to the impact of fiscal consolidation during austerity. Within this overall difficult context, yet, the EU policies and programmes pose a vein of opportunity for the R&I sector. Most of the national R&I institutions working on structural change or on gendered research and innovation are those linked to EU funded projects currently addressing themes like excellence, organisational culture and workplace, integrating a gender perspective into research and teaching, resistance to structural change and GEPs (Villa et al. 2021).

The role of EU projects has also been highlighted when reporting good practices and lessons to be learnt: experiences regarding *carriere alias* (UNIMIB), mentoring (UNINA), or the UNITO cirsde (Centro Interdisciplinare di Ricerche e Studi delle Donne e di Genere – CIRSDe of the University of Torino) regarding gender studies: methods and language open to all university students of 1st year of bachelor and master degrees. These good practices were mainly initiated by EU structural change projects or by centres devoted to gender equality within the universities. Often these interventions are more related to pushing factors of specific groups of interests rather than convinced support from top management.

In **Greece**, some positive advances in gender equality in R&I are related to the socio-economic context, which is also marked by important limitations. Over the past couple of years, there has been an increase in public attention to and awareness of sexual harassment and gender-based violence, supported by NGOs and social movements active in this area. In 2019, the public revelation of a Greek sportswoman (and an Olympic champion) that she had been a victim of sexual harassment helped spark the rise of a “Me Too” movement in Greece, which had a spill over in research and academia. Faculty, staff and students in universities and research centers began to talk more openly about incidents of sexual harassment and gender-based violence.

Besides the advent of a “Me Too” movement in Greece, there has been significant mobilisation to promote gender equality in universities and research centers. Such mobilisation has been prompted by, and gained leverage from EU policy, above all the Horizon Europe requirement that all HEIs and public RPOs must have GEPs. The establishment of gender equality committees in universities and research centers made it possible and their work to develop GEPs provided a frame for continuous discussion and networking across all universities and research centers in the country. This activity did not stop even during the pandemic; on the contrary, it continued with increasing momentum through regular online meetings. In terms of the political context, increased social awareness around issues of sexual harassment, gender-based violence and gender equality more broadly prompted the government over the past few years to pay more attention – even if of a token nature – to these issues.

Yet, government policy to promote gender equality and diversity specifically in the sectors of research and academia, has at best been inadequate or non-existent, despite the fact that EU R&I policy (including Horizon Europe) has included and highlighted the need to promote gender equality and diversity. Recent legislation on higher education and research included limited provisions on gender equality (described earlier) reluctantly and only after pressure by gender equality committees in universities and the Greek Association of University Women. Still, policy makers have so far been unwilling to allocate resources that would enable the implementation of gender and diversity actions designed in the GEPs (Anagnostou 2019).



Last but not least, a coherent gender equality discourse in research and innovation that sheds light on structural barriers and implicit bias has been lacking, and it is a central impediment: it severely limits the potential of GEPs and the power of change agents in research and higher education organisations to stimulate sustainable institutional change (Anagnostou 2022).

Regarding the economic context, the economic crisis and the large budget cuts that were applied in the public sector from 2010 onwards resulted in shrinking resources for the operation of universities and research centers (Kambouri 2021). While austerity policies are no longer applied, the contraction of the administrative, academic and research staff over the past decade has not returned back to its original levels. Many of the research, administrative and teaching needs are now covered by staff on temporary and/or project-based contracts (Kambouri 2021).

The implementation of GEPs is still at its infancy and it is too early to determine whether they have led to structural change. At this relatively early stage though, at least two practical lessons can be learned: 1) **Coordinated action among gender equality committees**, which have an institutional presence in universities and research centers in Greece, has played a key role in promoting the development of GEPs. Furthermore, along with the mobilization of the Association of University Women in Greece (ELEGYP), the network of gender equality committees has been able to influence legal and policy change over the past two years (as described in section 2) Interventions in R&I organisations have been more effective when the development of GEPs takes place in the frame of **EU-funded structural change programs**, which enable a university or research center to acquire expertise and to support a dedicated team of people with gender expertise to work on gender and diversity action, collection of data, etc.

In **Cyprus** the overall level of gender equality is rather low compared with other EU27 countries (it is ranked 21st in the EIGE's overall Gender Equality Index according to the data published in 2022). Xenofontos et al. (2022) cite the dominant patriarchal culture and persisting gender stereotypes as main reasons, but also remind that education was 'a privilege for the upper class until the mid-1950s' and that primary and secondary education only became compulsory for both men and women in the 1960s. According to EIGE⁹, the promotion of gender equality through policy and legislation is a relatively recent phenomenon in the country and gender mainstreaming is primarily influenced by EU directives and international conventions. Cyprus does not have an overall national law on gender equality and there is no government strategy for gender equality. There are several bodies responsible for advancing equality (eg. the Commissioner for Equality and the National Machinery for the Advancement of Women) but most with limited means and power. Xenofontos et al. (2022) state that, despite progress noted in recent years, insufficient steps are taken to mainstreaming gender equality in the different policy areas. Of particular note is the lack of women in leadership positions across all fields. The main practical lessons to be learnt are: 1) Participation in **EU-funded structural change projects** has been positive to initiating change. The Cyprus University of Technology (CUT) was part of the consortium of the Horizon 2020 project Gender-SMART and it is the only university in Cyprus which developed a GEP during the period 2016-2019. The adoption of the first GEP enabled a culture of awareness and an influential working group of faculty, administrative staff and students for gender equality issues. In turn, this group paved the way

⁹ <https://eige.europa.eu/gender-mainstreaming/countries/cyprus>



for a Senate Committee for Gender Equality with decision-making powers (and the adoption of a gender perspective in funding, research and teaching). CUT received several human resources awards and certification by the National Agency for the Certification of Businesses for the Implementation of Good Practices on Gender Equality at the Workplace. 2) Some organisations may be **pioneers** in adopting gender equality policies even when there is a lack of external funding and the legal and policy framework is not supportive. An example is the Cyprus Institute of Neurology and Genetics (CING), one of the island's top medical, research and postgraduate academic institutions, which received the Equality Employer accreditation in 2015. A study of this institution¹⁰ which explores gender parity in the context of gender representation and internal collaboration concludes that CING's egalitarian culture, policies and procedures, provide an extendable paradigm for improving and evaluating gender parity in academic organisations.' Another example is the University of Cyprus (UCY). It is the only public university with a dedicated EDI office, created in 2020. In this case, the EDI has played a positive role as a catalyst for structural change. The EDI office is in charge of GEP design and implementation, under the workings of one of its five thematic groups (gender equality; the others are LGBTQ+, people with disabilities, with a migrant background, and combating harassment, sexual harassment and bullying). Such structure may also facilitate the adoption of a more comprehensive and intersectional approach in equality policies.

Malta is still a rather conservative society, with significant progress in gender equality and inclusivity in general having been made only in the last few years. The efforts for inclusive gender equality of the more liberal Labour Party that came to power in 2013, of social movements, equality researchers and practitioners had to first be focused on more pervasive and urgent issues, like employment or gender-based violence. This contributed to delays in the adoption of key legal and policy measures for gender and equality mainstreaming. Namely, the Equality Act and the Human Rights and Equality Commission Act, proposed in 2015, have not been yet approved as of April 2023, notwithstanding a number of readings and discussions in Parliament and community. Also, a public consultation on the document 'Towards a Gender Equality Mainstreaming Framework' was launched in March 2019, but the resulting Gender Equality and Mainstreaming Strategy and Action Plan was adopted only in November 2022. Meanwhile, while significant progress has been made in women's participation in some fields (employment rates, share of women in Parliament; share of women appointed to public boards), there is still a large gender imbalance in the large companies (presidents, board members and employee representatives)¹¹. Moreover, although Malta passed several laws on LGB and Trans people in 2014-2015, discriminatory perceptions towards homosexual relations is widespread. According to a Eurobarometer 2019 survey, 80% of Maltese see same sex sexual relationships as something wrong¹². Furthermore, the proportion of Malta's R&D expenditure compared to GDP has decreased between 2012 and 2020 (from 0.8% to 0.7%) and remained far away from the set target of 2% of GDP by 2020¹³.

¹⁰ Xenophontos S, Zachariou M, Polycarpou P, Ioannidou E, Kazandjian V, Lagou M, et al. (2022) The Cyprus Institute of Neurology and Genetics, an emerging paradigm of a gender egalitarian organisation. PLoS ONE 17(9): e0274356. <https://doi.org/10.1371/journal.pone.0274356>

¹¹ Based on official statistics: National Statistics Office News Release 228/2022; Gender Equality and Mainstreaming Strategy and Action Plan

¹² The National Commission for the Promotion of Equality, Annual Report 2021

¹³ The Malta Council for Science and Technology, National R&I Monitoring Report 2019-2020; National Statistics Office News Release 125/2022 and News Release 040/2021



Portugal lags considerably behind other EU27 countries in what concerns gender equality in R&I. While in other countries a large share part of HEIs had already GEPs and dedicated units to deal with equality units, in Portugal the first institution to develop a GEP was University of Beira Interior in 2011 (Augusto et al. 2018). That initiative spread the development of others later in the 2010s. There was also a great impulse of European projects under H2020 funding where Portuguese HEIs, namely the bigger ones entered in consortiums (Sales Oliveira and Augusto 2017). Therefore, a significant part of the existent GEPs of Portuguese HEIs are very recent. What is also significant is that GEPs do not made public all relevant information, especially in what concerns the gender diagnosis, a fact that hinders dialogue and share of practice across institutions and practitioners. This situation is in line with the level of gender awareness of Portuguese society in general. It has been difficult to include gender equality in the policy agenda and it is still often dismissed as not a priority (Peterson et al. 2021). An exception is awareness towards domestic violence. Portuguese society is now conscious of the problem and tries hard to fight it despite the fact that the number of cases and feminicides is low. This shows the prevalence of a patriarchal culture even among the younger generations. In recent years assuming this orientation has become politically incorrect, but what prevails is empty statements around the promotion of gender equality that are not translated in policies and social practices (Augusto et al, 2018). However, between 2017-2022 the Equality and Citizenship State secretariat was able to carry out important initiatives and the country really made progress in this matter. In what concerns R&I, Portugal is currently in a turning point for further deepening policies and change (Jordão et al, 2022). Sexual harassment at academia is an issue since 2022 when the first case of complaints of sexual harassment emerged in the University of Lisbon, followed by Porto University. In the first case, after high media attention, the case was closed by the public prosecution. At Porto University several professors have been suspended already. The issue of gender equality tends to be politically instrumentalised, especially in what concerns education (with right-wing parties claiming that teaching gender equality is to disseminate a left-wing gender ideology). Academia tends to be left out of these debates but the issue of sexual harassment in academia is again on fire (in late March 2023 there was a statement of harassment in a research centre connected to a very well-known researcher).

Some main practical lessons to be learnt are: the experiences of both University of Beira Interior and University of Aveiro highlight that **team commitment, persistency and volunteering** are very important elements to promote organisational change towards gender inclusion (Augusto et al. 2018, Sales Oliveira & Augusto 2017, Jordão et al. 2022). The commitment of top management to gender equality was limited in 2010 and still is today despite all the efforts from European Commission. What has made the difference in these two projects was the personal commitment and belief of the team involved. To build teams of people with gender expertise and a certain dose of academic activism (Sales Oliveira forthcoming) is what can make a GEP or other gendered solution to be real and alive. Nevertheless, it is important to keep in mind the fragility of this team if based in the mindset of one or two persons. Sustainability over time is a central question. 2) Tackling **sexual harassment** and other forms of harmful behaviour is increasingly needed. In this regard, the recent case of University of Porto is very interesting. After the first complaints in June 2022, the university is exploring new ways to facilitate the communication this situation. It has established an online portal of complaints, which seems to be a good practice. One of the issues about harassment is the



difficulties that entail presenting a complaint. HEIs face difficulties for victims to fill comfortable but also need to improve neutrality and professionalism in dealing with such cases.

3.1 Literature review and assessment

National experts were asked to identify the most relevant literature in relation to structural change towards inclusive gender equality in R&I organisations in their countries. The review was not restricted to scientific literature - other publications such as policy briefs, working papers or reports from R&I organisations could be included. Priority was given to literature published in the last five years, with a focus on publications in local language. Table 2 maps the selected literature by country, topic and type of organisation. Each publication is referred by the code of the country and a number, as listed in the national literature provided in the references. As summarised in Table 4 below, a large bulk of literature refers to HEIs and explores the topics of initiating and sustaining change.

Table 4. Selected literature by country, topic and type of R&I organisation					
Topic	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Initiating change	MT2	CY2 EL1, EL2, EL4 MT6, MT9, M13	CY7, CY8, CY10 MT1, MT3, MT5, MT9, MT10		EL1 IT3
Sustaining and deepening change		EL3, EL6, EL7 IT1, IT2, IT4 PT1, PT2, PT3, PT4 ES1, ES2, ES5, ES7, ES10, ES11, ES13			
Adopting an intersectional approach		ES4			
Implementing gendered innovations					
Monitoring inclusive gender equality		CY1, CY3, CY4, CY5, CY6, CY9 EL5 PT5 MT7, MT8 ES3, ES8, ES12	MT4, MT11, MT12 ES6, ES9		EL5

Note: Each publication is referred by the code of the country and a number, as listed in the references. Codes of countries are: CY (Cyprus); EI (Greece); IT (Italy); MT (Malta); PT (Portugal); ES (Spain).

The survey asked national experts to assess the adequacy of the current knowledge base on structural change towards inclusive gender equality in R&I organisations for each of the five topics. The exact question was: Is it adequate to support significant, evidence-based advances



in the field of (inclusive) gender equality in R&I organisations? Experts were asked to reply to this question using a 4-scale ranging from "highly adequate" to "highly insufficient". Table 5 presents the results. This assessment is in line with the findings of the literature review.

Initiating change is the only topic in which the knowledge base is considered at least adequate, but only in Greece, Portugal and Spain. For all the other topics, in all countries, it is considered insufficient or highly insufficient. Even in Spain, where GEPs have been compulsory in universities since 2007 the knowledge base for monitoring, sustaining and deepening change is deemed to be insufficient.

Table 5. Assessment of the current knowledge base on structural change towards (inclusive) gender equality in R&I organisations in the country, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Cyprus	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Greece	Highly adequate	Highly insufficient	Insufficient	Highly insufficient	Insufficient
Italy	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Malta	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Portugal	Highly adequate	Insufficient	Insufficient	Insufficient	Insufficient
Spain	Adequate	Insufficient	Highly insufficient	Insufficient	Insufficient

In the following sections each topic is analysed more in depth, with a focus on identifying hindering and facilitating factors to foster or sustain significant advances in the field of inclusive gender equality in R&I organisations.

3.2 Initiating change

Empirical studies and evidence about initiating change is comparatively high in relation to other topics (except sustaining change) and is mostly based on the experiences of HEIs. It can also be noted that experts have paid especial attention to analyse literature and highlight key factors that hinder or facilitate initiating change in those Southern countries where the institutionalisation of gender equality policies - through GEPs or other instruments - is less widespread across organisations and and/or is more recent. It is mainly the case of experts in Cyprus, Greece and Malta, although experts from Italy and Portugal also provide useful insights in this topic.

According to experts' assessment, hindering factors related to the legal and policy frameworks and to the socio-cultural, political, and economic context play a major role:

- Unsupportive national legal and policy framework, including the fact that in spite of strategies and plans, there is no overseeing agency and limited accountability.



- Lack of awareness of the extent and persistency of gender inequalities, and how they intersect with other axes of discrimination and inequality; including the assumption that, because of improvements through the years, equality is 'just an issue of time'. In some cases, more serious difficulties are faced, related to the persistence of a patriarchal culture or the increasing influence of an anti-gender equality and anti-feminist discourse driven by far-right and conservative actors. However, there is an increasing concern about sexual harassment and other forms of harmful behaviour at societal level and this is also reflected in legal and policy developments.
- Weak feminist and gender equality movements, that are also cast as a "fringe". In contrast, the experience in Greece shows that when these movements are strong and influential, they play a crucial role in collaboration with gender experts, practitioners and activists within R&I organisations, as a catalyst for change at the political level.
- Low political priority given to gender equality. Sometimes it is coupled with economic pressures and high uncertainty, which also contributes to lack of resources and implementation delays in equality policies. Limited public expenditure on higher education and R&D is also a constraint.

On the positive side, the main contextual facilitating factors identified are:

- EU gender equality policies. This not only includes the new Horizon Europe eligibility criterion linked to funding, but also positive impact of transnational collaboration through EU-funded projects of structural change and other initiatives or programmes. Experts indicate that in some cases this impact is sustained over time in the organisation and has spill-over effects. EU policies have also had impact at the national level in terms of legal and policy developments. While there is a risk of lip service regarding GEP eligibility criterion in some R&I organisations, the high number of organisations adopting a GEP may provide a "critical mass" to pave the way for further advances.
- Pioneering R&I organisations as a catalyst of change through collaboration and networking with other organisations.

Concerning organisational factors, the survey identifies some aspects that are important in the context of the Southern countries:

- Limited (or absent) gender awareness and competence, especially among managers, human resources staff and senior researchers. This includes the belief that the organisation is gender neutral, thus equating interventions with 'lack of meritocracy'; in contrast, a committed and gender competent management team or research committee may be a key actor for recognising the need for action, initiating change and ensure its legitimacy within the organisation.
- Lack sex-disaggregated data within the organisation, as sometimes even the most basic data are no available. One of the lessons learned is that evidence about gender inequalities is a key factor for raising awareness and getting support from top managers.



- Centres or institutes of gender studies, women's associations as well as feminist scholars and practitioners may play a pivotal role for initiating change through advocacy, bottom-up pressure and (often unpaid and unrecognised) commitment over time. There is a risk of 'gender fatigue' and isolation when efforts are concentrated in a reduced team or a single person; for this reason, well established centres, networks and associations may be a key facilitating factor. In the case of universities, support from students and some of their associations is also seen as a facilitator.

Private R&I companies seem to face difficulties for initiating change in all countries. Some specific hindering factors identified in the survey are high competitiveness and economic pressures, alongside the lack of incentives, not only economic, but also awards or accreditations that are well established and prestigious within the R&I field. Some experts indicate that promoting public-private cooperation in R&I through comprehensive policies and mechanisms, including fostering the role of private actors in R&I governance - could be a relevant facilitating factor. However as highlighted above, this is a theme largely under-researched.

3.3 Sustaining and deepening change

Most empirical research on sustaining and deepening change is based on the experiences of R&I organisations (especially HEIs) that have been pioneers in countries where the context is not favourable - often through participation in EU-funded structural change projects. This also applies to research in Spain, where GEPs have been mandatory since long time.

The main hindering and facilitating factors for sustaining change build on those already identified for initiating change, especially when it comes to context factors. However, it is worth noting that even where context is relatively favourable (e.g., Spain), there is clear evidence of resistance as well as other difficulties for sustaining change over time. HEIs and many other research institutions are not only large and complex organisations, they also rely on implicit and gendered values and norms (e.g., meritocracy; ideal academic career) which are deeply rooted and still widely perceived to be 'gender-neutral'. Furthermore, the increasing precariousness of academic and research positions and the lack of career prospects leads to high competitiveness and conformity with the 'rules of the game' - a fact that also hinders change.

The survey also highlights some more specific organisational factors that are important in the Southern context. The fragility of top management commitment is stressed by several experts. When there are no equality units with adequate expertise and sufficient resources, institutional commitment relies almost exclusively on leadership and a change in management may lead to lip service and only formal continuity of GEP. Experiences in Greece and Portugal give insight on the importance of establishing such equality units while also maintaining bottom-up pressure and initiative over time - stressing again the need for both dedicated professionals and certain activism from feminist scholars and gender institutes. Some experts also point out that institutional learning is needed to sustain change - and this requires resources, equality structures and wider mechanisms for collaboration among different actors within the institution.

Another set of factors refer to data collection, monitoring and evaluation. Difficulties for establishing a regular system for gathering basic administrative sex-disaggregated data and



embed it into the institutional routine is a main barrier. Efforts to collect data are often so time-consuming and disappointing that other initiatives are postponed or abandoned. Yet, having regular data is key for tracking change and support an iterative, evidence-based process of GEP design, implementation, monitoring and re-design. In this regard, several experts highlight the potential role that public agencies may play in facilitating this process (providing guidance and support; encouraging collaboration among institutions through the establishment of expert groups or other means; setting monitoring requirements for collecting basic indicators and made them public; and supporting external evaluation, among others). This could also pave the way for more systemic advances such as setting targets and related incentives.

Finally, most experts stress that collaboration among organisations is a key factor for sustaining and deepening change. Collaboration can take diverse forms - the survey refers to institutionalised networks of equality committees, holding regular workshops and more informal networking activities. In all cases, collaboration is seen as a need for sharing knowledge and practice, mutual learning and innovation, peer-to-peer support, and increasing legitimacy and influence around gender equality priorities in the organisation, in the R&I ecosystem and more generally in policymaking.

3.4 Intersectionality

In general terms, experts consider that adopting an intersectional approach in equality policies requires further efforts in terms of empirical research. Experience in adopting such policy approach (for structural change and more generally) is not only scarce, but also under-researched, leading to lack of practical guidance and expertise. Too often institutions adopt diversity policies which mainly focus on visibility and representation under the assumption that it is the best way to deal with minoritised students or staff, leaving aside more challenging measures. It is also noted that in some institutions there are different policy instruments in place for advancing equality (e.g., a GEP, a disability plan; other initiatives and measures targeted to specific groups of staff or students) and adopting a more comprehensive approach requires huge institutional efforts.

Nevertheless, experts also indicate some promising developments in the Southern countries. Linked to raising awareness and concern about sexual harassment in society at large and R&I organisations in particular, some intersectional research has been conducted (or is underway) to better understand this problem and to contribute to design more effective sexual harassment protocols and policies in universities and other research organisations. Intersectional research is also emerging in other fields such as gender medicine and biomedical research, while there is growing interest in developing intersectional practice in health professions. Experts also flag some universities which are already moving forward and stress some common features, namely the presence of scholars with a background on intersectional studies and commitment to devote efforts to institutional policies; well established equality structures for dealing with different and intersecting grounds of discrimination; and some mechanisms for engagement and participation of different groups of staff and students.

3.5 Gendered innovations

The survey indicates a lack of relevant studies on gendered innovations in the private sector. This also applies to Spain, where integrating a gender perspective in technological



development and innovation is one of the aims of R&I policies. Experts indicate some potential facilitating factors, namely promoting cooperation between public and private institutions and strengthening funding incentives. Concerning funding, it is highlighted the need to establish clear priorities and target those R&I fields where incorporating a gender perspective is more needed, involve gender experts in the design of evaluation criteria and procedures, and provide guidance to R&I organisations. In this regard, several experts highlight that the very concept of gendered innovations is still largely misunderstood. Too often integrating a gender dimension in R&I products or services is equated with increasing women's participation in R&I institutions and projects.

3.6 Data monitoring

There is wide consensus in the literature and among practitioners that data collection, building meaningful indicators and regular monitoring is a crucial aspect of structural change towards gender equality in any organisation.

Some experts point that availability of sex-disaggregated data from administrative records is a must, but greater efforts are needed for analysing these data and support evidence-based concrete measures. In this regard, tracking gender inequalities across the lifecycle is a field where further analysis is needed.

Another aspect highlighted is that more efforts should be devoted to include gender-sensitive issues in institutional surveys (e.g., climate surveys for students and staff). Data collection should also encompass other relevant fields, for instance those related to integrating a gender dimension in higher education curricula (transversal and specific gender-related courses and programmes), R&I activities, funded projects and publications.

From a more general and systemic perspective, the survey indicates that there is scarce literature in this field and the current knowledge base is insufficient in the Southern countries. In this regard, several experts highlight the crucial role that public agencies may play for improving data monitoring, supporting external evaluation and setting targets.



4 R&I organisations

Differences in the number of R&I organisations in the Southern countries are related to the fact that there are small and large countries in this cluster. However, there are also other issues related to the lack of comparability in terms of definitions and units of measure. This is especially important for estimating the number of private companies involved in R&I activities. A common feature in this cluster is the relatively low share of GDP expenditure in R&I.

Table 6. Estimated number of R&I organisations by type of organisation

Country	HEIs	Public RPOs	R&I companies
Cyprus	60	30	50
Greece	24	20	2
Italy	100	20	100
Malta	114	3	166
Portugal	98	312	n.a.
Spain	86	468	11,162



5 Engaged stakeholders

The survey collected information on stakeholders already engaged in the five topics or potentially interested. In this regard, it is worth mentioning that in spite of an unfavourable context in many countries, there is a **high level of interest and potential for engagement in all topics** among all relevant actors: policy makers, research funding organisations, universities, public research institutes, private and non-profit organisations and existing networks or associations (see Tables 7 to 10).

Table 7. Overview of policy makers' indication of interest, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Cyprus (n=3)	2	1	-	2	2
Greece (n=3)	2	1	-	-	1
Italy (n=3)	1	2	2	1	1
Malta (n=3)	3	3	1	-	3
Portugal (n=3)	1	1	2	2	2
Spain (n=3)	3	3	3	3	3
Total (N=18)	12	11	8	8	12

Note: N and n indicate the number of policy makers identified. Policy makers can be interested in more than one topic. Numbers by topic indicate the number of identified policy makers interested in this topic.

Table 8. Overview of RFOs' indication of interest, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Cyprus (n=2)	2	1	-	-	1
Greece (n=3)	2	1	1	-	-
Italy (n=2)	1	1	1	-	1
Malta (n=2)	2	2	1	2	2
Portugal (n=3)	2	1	1	-	-



Spain (n=3)	2	2	2	3	3
Total (N= 15)	11	8	6	5	7

Note: N and n indicate the number of RFOs identified. RFOs can be interested in more than one topic. Numbers by topic indicate the number of identified RFOs interested in this topic.

Table 9. Overview of RPOs' indication of interest, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Cyprus (n=3)	3	3	-	2	2
Greece (n=3)	3	2	2	-	2
Italy (n=3)	1	1	2	2	2
Malta (n=1)	1	1	1	1	1
Portugal (n=3)	3	2	1	2	-
Spain (n=3)	-	3	3	-	2
Total (N=16)	11	9	6	7	7

Note: N and n indicate the number of RPOs identified. RPOs can be interested in more than one topic. Numbers by topic indicate the number of identified RPOs interested in this topic.

Table 10. Overview of networks' or associations' indication of interest, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Cyprus (n=3)	3	1	1	2	1
Greece (n=3)	3	2	-	-	3
Italy (n=3)	2	2	2	2	1
Malta (n=3)	3	3	3	1	1
Portugal (n=2)	1	2	1	-	2
Spain (n=3)	2	2	1	2	2
Total (N=17)	12	10	7	5	8



Note: N and n indicate the number of networks or associations identified. Networks or associations can be interested in more than one topic. Numbers by topic indicate the number of identified networks or associations interested in this topic.

When it comes to supporting the **communities of practice** (CoPs) in the five topics of interest within INSPIRE, national experts provided recommendations on various subjects to address, with consideration given to their relevance in each country. Table 11 below provides a summary of suggested topics for the CoPs.

The suggestions vary across countries. The experts suggested as potential CoPs some existing associations and networks that could play a fundamental role, especially in involving private companies, addressing resistance to embedding gender in the curricula, advocating for faster legal and policy change, as well as sharing experience in implementing GEPs. Cooperation, sharing knowledge, good practices and experiences seems to be one of the main proposals, highlighted by the experts of Greece and Malta for several topics. It also relates to the recommendation by the expert from Portugal, who suggests a coordinated action amongst different stakeholders, which could in fact be nurtured by the sharing of knowledge and experiences.

While the expert in Italy was not able to provide specific recommendations, experts from the rest of the countries pointed out to particular themes that would be worth approaching, like sexual harassment, brought up by the experts from Portugal and Spain, notably when talking about applying an intersectional approach. It is striking, however, how these two such crucial issues have not been mentioned by any of the other experts.

Other suggestions refer to male engagement and allyship, identified as a key topic when initiating change in Malta; the need to work on the challenges and resistances faced throughout the whole process, from initiating change to sustaining it (Portugal); the need to work on compliance tools to monitor the R&I organisations that initiate change and put a GEP in motion, and also monitor the extent to which those already counting on gender equality policies go beyond ticking the box, devoting budgets and real efforts in sustaining change (Cyprus); the need use to better use administrative data for tracking gender differences in R&I careers across the lifecycle (recruitment, accreditation, funding, promotion; leaves) (Spain). Suggestions in the specific field of gendered innovations in the private sector are diverse, and in general point to better coordination between public and private institutions and companies, sometimes suggesting specific fields of interest, such as gender medicine, biomedical research and healthcare.

Table 11. Suggestions for supporting Communities of Practice

Topic	Suggestions
Initiating change	<ul style="list-style-type: none"> • Cyprus: How to ensure that all R&I organisations have GEPs and pay attention to gender equality • Greece: To share experience in implementing GEPs across universities; to cooperate in order to advance common interests. • Malta: Male engagement and allyship • Portugal: Plans for Gender Equality in Higher Education Institutions (HEI) in Portugal: Reflections and Challenges



	<ul style="list-style-type: none"> Spain: GEPs in private R&I companies
Sustaining change	<ul style="list-style-type: none"> Cyprus: Ensure that universities and HE institutions go beyond creating a GEP to implementing, devoting a budget, and ensuring that actions are not just box-ticking. Greece: To share experience in implementing GEPs across research centres; to cooperate in order to advance common interests. Malta: Advocacy for faster legal and policy change Portugal: Resistances to embed gender in the curricula Spain: Gender competence in decision-making; gender budgeting
Intersectional approach	<ul style="list-style-type: none"> Cyprus: How to ensure that such an approach is adopted MT: Sharing of good practices, implementation, monitoring and evaluation processes Portugal: Sexual harassment policies at HEIs and RPOs Spain: Sexual harassment policies at HEIs and RPOs
Gendered innovations	<ul style="list-style-type: none"> Cyprus: There is a lot of potential in showcasing to private companies how gendered innovations Greece: To undertake and coordinate action towards gender equality between universities and external stakeholders (companies, local government bodies, research institutes, etc.) Malta: Sharing of good practices, implementation, monitoring and evaluation processes Spain: Gender medicine, biomedical research, healthcare (public and private R&I institutions and companies)
Monitoring	<ul style="list-style-type: none"> Cyprus: Monitoring of the implementation of GEP and other EDI initiatives Greece: To promote equal participation of female academics and scientists Malta: Use of open data Spain: Use of administrative data for tracking gender differences in R&I careers across the lifecycle (recruitment, accreditation, funding, promotion; leaves)



6 Training resources

One of the aims of the survey was collecting training resources in both English and national languages. Experts were asked to identify training resources with proven quality and impact in their countries and not included in EU repositories and tools, such as Gender Equality Academia or the GEAR tool. Several training resources have been developed in the frame of EU-funded projects of structural change and other European programmes and funds, whilst others rely on the initiative of national public bodies or R&I projects. The selected training resources cover a wide array of topics, from raising awareness and guidance for GEP design and implementation to more specific themes such as equal pay or evaluation. It is also worth to note that some resources do not focus only on gender, but also on other grounds of discrimination such as race and ethnic origin. Tables 12 and 13 summarise the information collected.

Table 12. Training resources in English

Country	Title	Description	Link
Cyprus	Going beyond the formal adoption of a Gender Equality Plan: A guide for universities	Guide for universities based on the approach and lessons learned from the TARGET project	http://www.gendertarget.eu/wp-content/uploads/2022/08/Guide-Universities_EN.pdf
Cyprus	How to design a gender sensitive culture	Webinar offered by the Gender-SMART project (23.03.2021)	https://gender-smart.eu/about-the-project/webinars-trainings/
Greece	LeTSGEPs Training Programme	Training programme developed by LeTSGEPs project on gender equality, GEPs and gender budgeting	https://letsgeps.eu/training/
Malta	Equal Pay Tool	Tool on equal pay for equal work developed by the project Prepare the Ground for Economic Independence	https://ncpe.gov.mt/en/Documents/Projects_and_Specific_Initiatives/Prepare_the_Ground_for_Economic_Independence/TU_Equal_Pay_Booklet_EN.pdf
Portugal	The Body and the App: Adapting participatory movement group methodology in theatrical performance to the online context	Training resource based on a case study about participatory methodology in online theatrical performance aimed at supporting women suffering from discrimination	https://methods.sagepub.com/case/participatory-movement-group-methodology-theatrical-performance-online
Spain	Gender equality in R&I	Comprehensive training course based on e-training modules. It was issued by the Spanish State Research Agency (main public funding organisation) in	Module 0. Introduction to the e-learning training modules on gender equality in R&I Module 1. Basic concepts and regulatory framework of gender equality in R&I



collaboration with the Women and Science Unit of the Spanish Ministry of Science and Innovation

[Module 2. The European framework for gender equality policies in R&I](#)
[Module 3. Unconscious gender bias in evaluation](#)
[Module 4. Use of non-sexist and inclusive language in R&I](#)
[Module 5. Integration of a gender perspective in R&I projects](#)

Table 13. Training resources in national languages

Country	Title	Description	Link
Cyprus	Boosting gender equality in education	Some lessons about combating gender stereotypes	https://medinstgenderstudies.org/wp-content/uploads/2022/09/BEE-manual-MIGS.pdf
Greece	Gender Equality Plans in Universities and Research Organisations – A Practical Guide	Guide for implementing GEPs in universities and research organisations, based on the TARGET reflexive approach and edited by ELIAMEP	https://www.eliamep.gr/wp-content/uploads/2021/01/TARGET_DIGITAL_WEBSITE_USE.pdf
Italy	Eguaglianza di genere e contrasto alle discriminazioni nelle università	Course of the University of Naples course on gender equality and non-discrimination in universities	https://lms.federica.eu/enrol/index.php?id=293
Malta	Racial and Ethnic Origin Equality Manual	Manual to implement equality policies considering racial and ethnic origin	https://ncpe.gov.mt/en/Documents/Our_Publications_and_Resources/Resources_and_Tools/Handbooks_and_Manuals/gabra_ghodda_manwal_ujwali_anza_persuni_irrispettivament_razza_origini_etnika.pdf
Malta	Inclusive Advertising - Guidelines for authors and/or publishers of adverts	Guidelines for authors and/or publishers of adverts	https://ncpe.gov.mt/en/Documents/Our_Publications_and_Resources/Resources_and_Tools/Guidelines/reklamar_inklussiv.pdf
Portugal	Referencial de formação	Training guide for HEIs to raise gender awareness	https://www.cig.gov.pt/wp-content/uploads/2021/02/IMH_Ref-16_EDU_IG2535-1.pdf
Spain	Gender equality and evaluation Three workshops: 1. The gender dimension R&I 2. Gender stereotypes in the	The National Agency for Quality Assessment and Accreditation (ANECA) public agency responsible for the evaluation, certification and accreditation of academic	https://www.aneca.es/-/aneca-promueve-formación-sobre-la-dimensión-de-género-en-el-conocimiento-la-innovación-y-el-desarrollo-tecnológico



evaluation process 3. Clarity and transparency in the evaluation process	staff, university institutions and centres. This was its first training course on gender equality and evaluation. The course was addressed to all chairs and vice-chairs of ANECA's evaluation committees.	Registration in ANECA training online platform is required
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7 Conclusions

The main aim of the survey was to provide contribute to the INSPIRE research programme through collecting information and analysis on policy developments and research debates at the national level. The analysis of the survey in the Southern countries provides findings and indications to support INSPIRE activities to promote structural change towards inclusive gender equality in R&I.

There are marked differences in the legal and policy frameworks on gender equality in R&I across Southern countries. These differences were already identified by EIGE in the GEAR tool. In particular, the legal framework was considered precise and comprehensive in Spain, and several legal provisions were identified in Italy and Greece. However, there were no laws or regulations explicitly promoting gender equality in R&I in Cyprus, Malta and Portugal as of August 2021. Since then, changes in the legal framework have not altered substantially such differences. The survey also indicates a growing concern on sexual harassment, gender-based violence and other forms of harmful behaviour, both in society at large and in R&I organisations. This has led to new legal developments and policies in several countries.

As a general feature in all countries, the survey indicates clearly that the legal and policy framework is more adequate to support R&I organisations to initiate change than to sustain and deepen change, including addressing any of the other topics of interest of INSPIRE. It is telling that there is consensus among experts in all countries that more supportive legal and policy measures are needed to foster monitoring and evaluation in R&I organisations. The survey also shows important differences between countries. Spain and Portugal are the countries where the legal and policy framework is better assessed. In contrast, lack of adequate legal and policy measures is especially marked in Cyprus and Italy.

The extent of GEPs uptake has been assessed by national experts based on available literature and evidence. It is clearly most pronounced in HEIs: in almost all countries, most or many universities have GEPs. The uptake of GEPs is clearly higher in HEIs and public organisations than in private or non-profit organisations. This is the result of legal and policies measures developed over time in countries such as Spain, Greece and Italy, as well as the Horizon Europe eligibility criterion.

The survey indicates a clear need to improve the knowledge base for supporting significant advances in structural change in R&I organisations in all countries. Initiating change is the only topic in which the knowledge base is considered at least adequate, and only in Greece, Portugal and Spain.

The survey has also provided meaningful insights on how the socio-cultural, political and economic context impact the institutionalisation of gender equality in R&I along with practical lessons that can be learned.

Hindering factors related to the lack of supportive legal and policy frameworks and to the wider national context play a major role. In contrast, EU gender equality policies are widely considered a key facilitating factor. This not only includes the new Horizon Europe eligibility criterion linked to funding, but also positive impact of EU-funded projects on structural change and other transnational initiatives or programmes. The survey also indicates that pioneering



R&I organisations can be a catalyst of change through collaboration and networking with other institutions.

Most experts stress that collaboration across organisations on gender equality issues is a key factor for sustaining and deepening change. It allows sharing knowledge and practice among gender scholars and practitioners, mutual learning and innovation, peer-to-peer support, and increasing legitimacy and influence.

The survey also stresses the important role of feminist and gender equality movements. They may play a crucial role in collaboration with gender institutes, feminist scholars and practitioners within R&I organisations for initiating and sustaining change.

Finally, the survey indicates that in all countries there is a high level of interest and potential for engagement in all topics among all relevant actors: policy makers, research funding organisations, universities, public research institutes, private and non-profit organisations and existing networks or associations. It has also provided meaningful suggestions for potential communities of practice and themes that are relevant in each country.



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D2.2 Central & East Europe Country Cluster Report

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Consortium

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

CoP	Community of Practice
EC	European Commission
EDI	Equality, Diversity and Inclusion
EU	European Union
GE	Gender Equality
GEP	Gender Equality Plan
HE	Higher Education
HEI	Higher Education Institution
HR	Human Resources
ICT	Information and communications technology
NGO	Non-governmental Organisation
RFO	Research funding organisation
RPO	Research performing organisation
R&I	Research and Innovation
STEM	Science, Technology, Engineering, Mathematics



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1 Introduction

This is one of the four (EU27) country cluster reports which analyse the results of the expert survey conducted by INSPIRE, a Horizon Europe project aimed at building a sustainable centre of excellence on inclusive gender equality in research and innovation (R&I).

INSPIRE survey

The survey involved one expert in each EU27 Member State and provided crucial support to the INSPIRE research programme on structural change towards inclusive gender equality in R&I, through:

- collecting information and analysis on policy developments and research debates at the national level; and
- identifying engaged stakeholders, other potential experts and relevant resources in the country, as well as collecting suggestions to support existing or potential initiatives for developing new communities of practices (CoPs).

The information collected was also meant to be a useful resource for the R&I ecosystem in Europe and beyond, including policy makers, researchers and equality practitioners across Europe,

The survey focused on **structural change towards inclusive gender equality in R&I organisations** in the country, defined as a long-term, sustainable process aimed at building an institutional environment (values, norms, structures and procedures) in which inclusive gender equality is widely discussed and explicitly embraced in organisational and individuals' practices having a demonstrable impact on reducing gender and other axes of inequality and discrimination within the organisation.

A **Gender Equality Plan (GEP)** is an **instrument** to institutionalise a gender equality policy and implement a structural change process. In the survey, GEP was defined according to the eligibility criterion and minimum requirements established by the European Commission to participate in Horizon Europe. Organisations may adopt similar/equivalent instruments to implement structural change or alternative instruments. These **alternative instruments** may focus only on gender or be interventions that fall under the umbrella of Equality, Diversity, Inclusion (EDI) policies, or just diversity policies.

The survey addressed **five topics** of interest related to structural change:

- **Initiating change:** How organisations can be encouraged to adopt a gender equality policy (GEPs and equivalent/alternative measures) based on local knowledge, experience and change movements as well as evidence-based tools (e.g., gender equality audit).
- **Sustaining and deepening change:** How organisations can address resistances and sustain and deepen change by building institutional gender competence, dedicating resources and structures, promoting evidence-based measures and broadening the scope of intervention (e.g., integrating sex/gender analysis in curricula or research content; implementing a sexual harassment protocol).



- Adopting an **intersectional approach**: How organisations can move from GEPs and/or EDI interventions to inclusive intersectional GEPs fostering change towards equality.
- Implementing **gendered innovations**: How innovation clusters and private R&I companies can be encouraged to implement gendered innovations - that is to innovate by integrating methods of sex and gender analysis into their R&I products or services, ideally taking into account also other axes of inequality and discrimination.
- **Monitoring inclusive gender equality**: How organisations can support an evidence-based inclusive gender equality by implementing effective monitoring conceptual approaches, tools and indicators - in particular in the four topics identified above (initiating change; sustaining and deepening change; adopting an intersectional approach; implementing gendered innovations).

The survey addressed structural change in **all types of R&I organisations**:

- Research funding organisations (e.g. research Ministries and public bodies funding basic and applied research; innovation agencies; other public and private institutions funding research and/or innovation).
- Research performing organisations:
 - Higher education institutions (public and private)
 - Other public research performing organisations (publicly funded research institutes)
 - R&I companies (e.g., private companies providing R&I products or services)
 - NGOs and other non-profit research performing organisations (e.g., private R&I foundations)

Country cluster report

The comparative analysis of the survey was conducted in four country cluster reports: North West countries, Central West countries, Southern countries and Central East and Eastern countries.

This Central and Eastern Europe country cluster report analyses the results of the survey in eleven countries: **Bulgaria, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia.**

The information used to elaborate this report was collated by the following experts:

- Bulgaria Georgi Apostolov
- Croatia Brigita Miloš
- Czechia Jana Dvořáčková
- Estonia Martin Jaigma
- Hungary Beáta Nagy
- Latvia Nina Linde
- Lithuania Aurelija Novelskaitė
- Poland Marta Warat and Karolina Sikora¹

¹ The experts from Poland are affiliated to UJ, an institution member of the INSPIRE consortium.



- Romania Monica Stroe
- Slovakia Alexandra Bitušiková
- Slovenia Martin Pogačar, Iva Kosmos and Jovana Mihajlović Trbovc²

For further details regarding the methodology followed to collect the information and elaborate this report, please refer to the Methodological Annex.

² The experts from Slovenia are affiliated to ZRC SAZU, an institution member of the INSPIRE consortium.



2 Legal and policy framework

This chapter describes the changes in the legal and policy framework related to gender equality (GE) in Research & Innovation (R&I) in Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia since 2021. This is followed by an overview of intersectional policies existing in the countries, policies on gendered innovation and anti-discrimination legislation, as well as an assessment of the current legal and policy framework in the five thematic areas by national experts.

2.1 Legal Framework

Based on the GEAR tool prepared by August/September 2021, the experts from Bulgaria, Czech Republic, Estonia, Hungary, Latvia and Slovakia indicated that there have been no relevant legal changes in the field of gender equality in R&I in their respective countries since 2021. In Croatia, Lithuania, Poland, Romania and Slovenia, on the other hand, the experts pointed to relevant legal changes in this area. However, in all the former countries, with the exception of Slovenia (and partly Croatia, where the legal framework provides for greater awareness of gender equality in education), the legal changes are not specific to the R&I sector. According to the reports, the most important legal changes were made in the area of working conditions.

Specifically, the legislative amendments concern measures to ensure work-life balance for employees, such as parental leave and childcare support or remote working or adjustment of working hours (Lithuania, Poland, Romania) and sexual and other harassment and violence (Croatia, Slovenia and Romania). In Poland, the amendments to the Labour Code focus on telework and flexible working hours. These relate directly to care work and work-life balance of employees (including in R&I), as the availability of telework is guaranteed—unless this is not possible—to pregnant employees, employees who are parents of a child under 4 years old, or employees caring for a disabled family member. The legal framework allows flexible working hours for employees caring for a child under 8 years old. The amendment also introduces an additional care leave of 2 days (or 16 hours) per year and an additional care leave (5 days per year) for family medical emergencies. While we can say that the focus on remote working and work-life balance may be the result of the COVID-19 that affected the welfare of the workforce, it is not clear whether such legal changes targeting care and family are also a result of conservative shift and right-wing policies that focus on the reproductive role of women. In Romania and Croatia, legal changes were introduced regarding gender-based violence and sexual harassment. In both countries, these changes affect the R&I as the legal framework is implemented in all public institutions and private companies. In Romania, the amendments require employers to establish a framework for gender mainstreaming and for the prevention of sexual and other forms of harassment. Public institutions are required to draw up and adopt their own internal guidelines setting out the procedure for filing and handling complaints and measures to prevent harassment. In Slovenia, the new Research and Development Activities Act (ZZrID), which came into force in 2022, contains an explicit prohibition of sexual and other harassment in R&I. Another amendment concerns the introduction of equal opportunities in professional development through the adoption and implementation of a programme of measures and reporting on its impact in regular annual



reports (Art. 75). However, it remains undefined how this requirement will be reviewed and how equal opportunities in the institutions will be ensured.

In summary, in more than half of the countries in the Central-East country cluster, no legal changes have been made. However, in other half of the countries, the focus is on harassment, work-life balance and care work, which largely reflects the conservative political shift towards a family as a normative framework based on two genders (a mother and a father). This shift poses a risk that such changes would strengthen traditional gender roles and family-oriented discourses, especially in Poland, Romania and Hungary. The researchers of the “Who cares in Europe” project show the regressive tendency in politics in Europe to view the family largely as a naturalised, static unit that has a socially productive and nationally reproductive function. The narratives are largely part of anti-gender discourses in which women's emancipation and the expansion of LGBTQ+ rights are seen as threats to the restoration of the family (see e.g., Zaharijević 2018; Kubisa and Wojnicka 2019).

2.2 Policy Framework

Regarding the policy framework, experts from all countries reported changes. The majority of countries have adopted or revised gender equality action plans for the period 2021–2023. In Estonia, the Estonia 2021 strategy aims to improve the quality of higher education (HE) by increasing equal opportunities. However, no separate goals related to gender equality have been targeted. In Lithuania, the Action Plan for Equal Opportunities for Women and Men 2023–2025 was adopted in 2023 to ensure equal opportunities in the areas that were not earlier targeted by the state policy. However, the discourse of the action is very heteronormative as it only includes women and men, and also it has no particular focus on R&I. In 2022, the National Programme for Equal Treatment (2022–2030) was officially launched in Poland. It is envisioned as the continuation of the National Action Plan for Women, Peace and Security (2018–2021). Within the eight main priorities, the programme includes specific goals and tasks related to equality in research and development, such as implementing an inclusive approach in education, promoting diversity in the workplace and raising awareness of the existence of discrimination and hate speech in the social sphere. In Czechia, the previous Strategy for Gender Equality in the Czech Republic (2014–2020) has been replaced by the Strategy for Gender Equality in the Czech Republic (2021–2030), which relates more directly to the field of R&I. Chapter 8 is about reducing horizontal and vertical gender segregation (including among students), integrating the gender dimension in teaching and research, and applying a gender perspective in the management of education and research institutions. It also includes support for the implementation of gender equality plans in R&I institutions under the coordination of the Gender Equality Department of the Government Office. In Slovakia, the Slovak government has adopted the “State Strategy for Equality between Women and Men and Equal Opportunities 2021–2027” and the Action Plan 2021, which includes the chapter entitled “Equality between women and men and equal opportunities in Education, Research and Science”. This chapter focuses on combating stereotypes, violence against women and children, support for families and single mothers and sexual harassment, without specific provisions for gender equality in R&I. In Hungary, the Action Plan “Empowering women in Family and Society” (2021–2030) was slightly revised in 2023 to include specific targets for gender equality in areas where women are underrepresented: Decision-making and leadership (including career development), women's presence in STEM and preventing the “leaky



pipeline", employability of women with children under 6, and a focus on digital literacy. In Slovenia, a draft resolution on the National Programme for Equal Opportunities for Women and Men 2021–2030 was sent to Parliament in 2021, but has not yet been adopted; the new version is still being prepared. New measures envisaged in the proposal refer to increasing women's participation in STEM and reducing gender gaps in digital technologies, reducing sexism and stereotypes, and promoting gender-sensitive language. In addition, during the EU Presidency, the Slovenian government proposed the 2021 Ljubljana Declaration to the European Council of Ministers, which promotes gender equality, but its implementation depends on individual signatories. As higher education and R&I fall under different laws in Slovenia, there are two main policy documents. The policy document directly dealing with R&I is the Resolution on the Strategy for Scientific Research and Innovation in Slovenia 2030, which clearly focuses on gender equality in R&I compared to the previous resolution. The main improvements concern the structural changes, which include: GEP as a binding document, prevention of sexual harassment and other forms of sexual violence. An important step is the introduction of gender mainstreaming in the funding and performing research, in awarding and decision-making; in the evaluation of research institutions in the context of institutional funding; the appointment of a panel of experts within the Ministry of Science to identify systemic barriers and assist in the drafting of legal acts and other strategic documents; and the collection of comprehensive gender-disaggregated data as key to effective policy-making and monitoring of the implementation of gender equality measures. In contrast, the new resolution on the National Programme for Higher Education 2030 (ReNPVŠ30) does not explicitly mention gender equality or equal opportunities. In Romania, the Strategy for the Promotion of Equal Opportunities and Treatment of Women and Men and for Combating Domestic Violence (2022–2027) was adopted in 2022. It is the first data-driven gender equality Strategy and it incorporates a gender impact assessment and an intersectional approach as instruments of gender mainstreaming. In relation to R&I, the focus is on gender balance in STEM. In this document, as in the National Strategy for Workforce Employment 2021–2027, another important objective is to reduce gender inequalities in the labour market and increase women's participation in the labour market, including through the collection and use of disaggregated statistical data on wages, as well as measures to reconcile work and family and care work (childcare support measures). Regarding R&I, the main policy changes are presented in the National Strategy for Research, Innovation and Smart Specialisation (2021–2027). The national research organizations should adopt the EU framework of gender equality, without the document elaborating on how this will be done. Another change concerns the funding policy: from 2023, the research team applying for funding must ensure a gender-sensitive approach in the application and the composition of the team. There is a significant lack of legislation and policies in Bulgaria to promote GE in R&I. This is due to the seemingly achieved gender equality, as Bulgaria is one of the leading countries in the EU with a gender balance in the number of researchers (women 53%, men – 47%, including HE). The only time GE is mentioned in the Strategy for the Development of HE in Bulgaria (2021–2030) is in the statement about a relatively balanced share of women researchers in science and ICT. In the area of R&I, apart from equal treatment of women and men and anti-discrimination measures, GE is not further mentioned.

In summary, the number of policy changes has been quite high in the region in the last 2 years. However, some limitations need to be noted, in particular the fact that these changes concern the area of R&I in a lesser extent. In the case the changes target R&I, they are related



to STEM or narrowing the gender gap in digital skills. In some countries, policy changes, concern the development and adoption of GEPs (Croatia), ensuring gender/sex disaggregated data collection and introducing changes in national funding programmes to make (Slovenia and Romania). Finally, in Slovakia and Bulgaria, there are no regulations specifically related to gender equality in R&I. In these two countries there is a lack of policy measures (and thus policy changes) with regard to GE in R&I. As in the case of the legal changes, the rhetoric of policy documents and proposed measures are largely heteronormative: the rhetoric of “equality between women and men” is interchanged with the framework of “equal opportunities/equal treatment” (Poland) or “gender equality” (Czechia). Hungary and Slovakia put a special emphasis on women and family, which can be seen as a result of the retraditionalisation tendencies. The experts’ analysis shows that Bulgaria is a special case in this matter: the Constitutional Court has declared that the Istanbul Convention contradicts the Bulgarian Constitution and the Parliament has refused to ratify it. As a result of such a political decision and surrounding political climate, the term “gender” acquired a very negative connotation, as referring only to LGBT+ and the promotion of homosexual relations. This results with the public climate that any GE-related policies are dismissed as “gender ideology.”

What concerns the focus on **an intersectional approach**, in the Central-East country cluster, there are no policies that target this topic. However, anti-discrimination policies are mentioned in Lithuania and Slovenia. In Lithuania, the problem of social exclusion and potential discrimination based on gender, social status, age, disability, language, origin, race, nationality, citizenship, beliefs or opinions, sexual orientation, ethnicity, faith, health or other grounds is recognised and addressed in the Programme of the Ministry of Social Security and Labour of the Republic (2021–2030). There is no evidence of an intersectional approach related to R&I. Similarly, in Slovenia there is no specific policy that explicitly promotes an intersectional approach to gender equality policies in R&I. However, there is a public body – Advocate of the Principle of Equality – which acts as a kind of ombudsman as well as being involved in promoting gender equality policies in different areas of society, including in R&I. It provides support in cases of exclusion and discrimination based on gender, nationality, racial or ethnic origin, religion or belief, disability, age and sexual orientation). In addition, the Student Status Act (ZUPŠ-1, May 2022), which complements the Higher Education Act (ZVis, in force since 1994), explicitly guarantees equal treatment in education “irrespective of nationality, racial or ethnic origin, national and social origin, gender, health, disability, religion or belief, age, sexual orientation, marital status, wealth or other personal circumstances.” **In conclusion**, in most countries the legal and policy framework regarding intersectionality can be considered non-existent, with the exception of Slovenia and Lithuania, where we can track only the mention of intersectionality in relation to discrimination in the legal documents, including those dealing with R&I.

For **R&I policies in private companies** the experts could not give an assessment due to lack of relevant data. Only three expert reports confirm the existence of R&I policies in the private sector: Estonia, Croatia and Romania. In Estonia, the “Estonian Research and Development, Innovation and Entrepreneurship Strategy 2021–2035,” which is part of the Estonia 2035 strategy, aims to reduce the gender pay gap and gender segregation in all HE and RPOs. In Croatia, there exists a policy document entitled Women’s Empowerment Principles, aimed at promoting gender equality and empowering women in business, signed by private companies in the field of R&I. In addition, there is an award mechanism for private R&I companies in the field of GE. In Romania, the research funding programmes in the National Plan for Research,



Development and Innovation (2022–2027) include a recommendation to integrate a gender dimension in research in the case of both public and private institutions.

In general, there is a lack of information, knowledge and data in regards to gender equality in private R&I institutions. Experts could not provide more substantial assessment, which may be due to the fact that the private companies in the area of R&I are fragmented and operate beyond the larger system of public R&Is. The potential reason for this is that private R&I is still not particularly strong, as higher education and research are still predominantly publicly owned probably due to the legacy of state or social ownership that was prevalent during the socialist period.

2.3 Legal Prohibition of Discrimination

In all countries of the Central East cluster, the Constitution and the various laws prohibit discrimination on the basis of ethnic origin, race, colour, gender, language, origin, religion, political or other opinion, age, health condition and disability or sexual orientation, education, financial or social status, marital and family status or on other grounds. National anti-discrimination laws are adopted in the respective countries in accordance with EU directives and EU human rights standards. There is also the institution of the Ombudsperson in the Equal Opportunities Office, which ensures that anti-discrimination legislation is implemented. While the main grounds of discrimination are covered in all countries, not all laws include discrimination on the grounds of trade union membership.

From a country-specific perspective, in Estonia, the Gender Equality Act prevents discrimination on the grounds of gender, pregnancy and childbirth, parenthood, performance of family obligations and other circumstances related to gender (e.g., being transgender). In the course of EU accession preparations and negotiations, Croatia has aligned its obligations with European human rights and anti-discrimination standards. As in other European countries, special attention is paid to the problems of racial, ethnic and gender discrimination and to combating them and protecting the rights of victims. In Hungary, the special Equal Treatment and Promotion of Equal Opportunities Act (ETA) of 2003 legally prevents discrimination on the basis of 19 categories. In addition, the general anti-discrimination clause of the Hungarian Fundamental Law was adopted in 2011. Hungary has also ratified the main international anti-discrimination instruments, albeit with some exceptions such as Protocol No. 12 to the European Convention for the Protection of Human Rights and Fundamental Freedoms, the Optional Protocol to the International Covenant on Economic, Social and Cultural Rights and the Protocol on Collective Complaints to the Revised European Social Charter. In Bulgaria, the main anti-discrimination law is the Protection Against Discrimination Act (PADA) of 2004. PADA prohibits and defines direct and indirect discrimination, multiple discrimination, including discrimination by association and by presumption. In Czechia, there is no strict definition of the specific grounds of discrimination, with the exception of disability, which is explicitly defined as a physical, sensory, mental, psychological or other impairment that limits or may limit the right to equal treatment. Moreover, multiple discrimination is not explicitly targeted within the scope of the Anti-discrimination Act (victims cannot claim discrimination on multiple grounds). In Romania, HIV-positive status is also mentioned as a ground for discrimination, while in Lithuania the national anti-discrimination law consists of two main legal acts: the Law on Equal Opportunities for Women and Men (adopted in 1998) and the Law on Equal Treatment



(adopted in 2003). In Slovenia, the main anti-discrimination laws prohibit discrimination on the grounds of gender, language, gender identity or gender expression, social status, economic situation and education, and all the main laws contain a general clause on 'other personal characteristics' (which may include health status, nationality, pregnancy, parenthood and marital status). Regarding marital status, the new amendment to the Family Code (from May 2023) makes heterosexual and homosexual married couples, couples in a civil partnership or de facto couples (people who state that they live together as a couple) fully equal in law. Indirect discrimination is only permitted if such a provision, criterion or practise is objectively justified by a legitimate objective and the means of achieving that objective are appropriate and necessary. A distinctive feature compared to other countries is the role of Advocate of the Principle of Equality who carries out independent investigation and report on the particular personal circumstances (gender, nationality, racial or ethnic origin, religion or belief, disability, age and sexual orientation). The report is used to make recommendations to state authorities, local authorities, public bodies, employers and other bodies. In Poland, although the Constitution prohibits discrimination under the Law on Equal Treatment, the system is not uniform. For example, the scope of protection in the area of social security and access to services is broader than in the areas of education and health (in the latter, gender is not a protected characteristic). Under the scope of protection adapted by the Polish Criminal Code, a hate crime is recognised as an attack based on nationality, ethnicity, race or faith, but not on sexual orientation or gender. In Latvia, the Education Law prohibits discrimination on the basis of race, colour, age, disability, political, religious or other opinion, national or social origin, financial or marital status, sexual orientation or other factors.

Overall, all countries surveyed in this cluster, according to the experts, have been unable to put in place an adequate legal and policy framework that would directly address the area of R&I. More than half of the countries report no legal development in the area of gender equality in the last two years, while in the rest of countries the changes do not concern R&I. In terms of policy changes, the focus is on gender-based violence and family- and care-related policies. Slovakia and Bulgaria seem to stand out on most issues, as their legal and policy frameworks are rated as inadequate by the experts. No country has an adequate framework in relation to the intersectional approach, which seems to be the weakest aspect in the legal and policy frameworks. The only exceptions are Lithuania and Slovenia, where the intersectional approach is mentioned in policy documents. As far as anti-discrimination is concerned, most of the legal provisions date back to before 2010, which proves that legal changes were introduced as the part of “external” factors—enforced by the EU as the part of the accession process. The legal and policy framework for private companies is not yet sufficiently researched, so experts cannot provide an informed assessment. As far as differences between geographical areas are concerned, there are no significant differences between the Baltic countries (Estonia, Latvia and Lithuania) and the Central and South-Eastern European countries.

An overall assessment of the current national legal and policy framework situation in the eleven countries is given in Table 1. The table shows how national experts assessed whether current legal and political framework is adequate to foster or sustain significant advances in the field of (inclusive) gender equality in R&I organisations. The possible answers ranged in from highly adequate to highly insufficient.



Table 1. Assessment of national legal and political framework, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Bulgaria	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Croatia	Insufficient	Highly insufficient	Highly insufficient	Insufficient	Highly insufficient
Czechia	Adequate	Insufficient	Highly insufficient	Adequate	Insufficient
Estonia	Adequate	Adequate	Insufficient	Insufficient	Adequate
Hungary	n.a.	Insufficient	Highly insufficient	n.a.	n.a.
Latvia	Insufficient	Insufficient	Highly insufficient	Insufficient	Highly insufficient
Lithuania	Adequate	Insufficient	Highly insufficient	Insufficient	Highly insufficient
Poland	Insufficient	Insufficient	Highly insufficient	Highly insufficient	Insufficient
Romania	Adequate	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Slovakia	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Slovenia	Adequate	Insufficient	Insufficient	Highly insufficient	Adequate



3 Structural Change

This chapter is based on the responses and literature that the national experts were asked to provide in order to give an insight into structural change regarding GE in R&I in their respective countries.

3.1 Literature Review

All national experts were asked to select the most relevant literature about structural change towards (inclusive) gender equality in R&I organisations in their country: at least 5 publications – out of which at least 3 should be in the local language, while giving priority to the most recent publications (published in the last 5 years). Both academic literature and other types of publications could be included.

Here we will discuss the main features of the identified literature, which has been examined in-depth in the report created for the INSPIRE project: “D2.1 KSH2 Report: Initiating Change Beyond the Centre. A Literature Review of Gender Equality Plans in Research Organisations across Europe” (Krzaklewska et al. 2023). For this report, the team from ZRC SAZU (Iva Kosmos, Jovana Mihajlović Trbovc and Tjaša Cankar)³ examined literature suggested by the national experts from EU27 Member States that fall into the group of “Widening countries”, as the literature review was conducted with purpose to provide the INSPIRE Knowledge & Support Hub (KSH) “Widening Participation” with the relevant background for its work. The term “Widening countries” refers to a group of countries that are evaluated as less advanced in R&I (European Commission 2023) or, in other terms, the countries with low participation rates in FP7 and H2020 projects (European Research Executive Agency n.d.). Among the EU27 Member States, these are countries clustered as Central & Eastern Europe within the INSPIRE project (Bulgaria, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia) and four countries (Cyprus, Greece, Malta, and Portugal) that belong to the Southern Europe country cluster in INSPIRE D2.2. Therefore, in the sub-section of this document – D2.2 Central & East Europe Country Cluster Report – we are summarising only those findings of the D2.1 KSH2 Report that relate to the countries of the East Europe while excluding those from the South.

The answers of the national experts show that the number of publications has been increasing over the years, and the largest proportion of the sources were published in 2022 (bearing in mind that the survey was finalised in June 2023). This indicates the growing interest in the analysis of these processes as institutions take steps to introduce gender equality plans, also as a result from making GEPs an eligibility criterion for all public institutions who want to participate in Horizon Europe programmes from 2022 onwards (Krzaklewska et al. 2023, 14).

Concerning the outlet of the publications, the journal articles constitute almost the half of the literature selected by the national experts, and reports are second most prominent type of publications. This “indicates that important information from the field might be disseminated via grey rather than scholarly literature” in this group of countries (ibid, 22). While journal articles were predominant, they mostly dealt with practical issues rather than theoretical

³ Here we acknowledge help of Sara Krulc who was intern at the ZRC SAZU in July-August 2023.



considerations or more critical approaches, further indicating grey literature as an important source of knowledge on the field (ibid, 63).

All collected publications are listed in the Annex (Table B), clustered by countries and put in alphabetical order. Each reference is given a unique code (based on the country acronym) and this code is used for marking what topic(s) are covered in a particular publication, and which type of organisation the reference relates to (see Table 2). The marking was made on the basis of reading the English abstract of each publication. The same reference can refer to more than one topic and/or more than one type of R&I organisation. The overview of the topics and type of organisation covered in each publication is presented in the Table 2 and are discussed further below.

Table 2. Selected literature by country, topic and type of R&I organisation					
Topic	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Initiating change	BG3, CZ2, HR6	BG3, BG6, BG7, BG10, CZ1, CZ3, CZ4, CZ5, CZ6, EE2, EE3, EE4, HR1, HR7, HU2, LT1, LT2, LT5, LT6, LT8, LT9, LT11, LV7, PL2, PL6, PL9, RO4, RO6, RO10, RO11, RO13, SK3, SK4, SK5, SI1, SI2, SI3, SI7	BG3, BG7, CZ3, CZ4, CZ5, CZ6, EE3, EE4, HR1, HU2, LT1, LT2, LT5, LT6, PL9, RO6, RO10, RO13, SK4, SK5, SI1, SI7, SI9	HR1, HR5, PL4, PL9, RO10, RO13	RO10
Sustaining and deepening change	LT10	HU1, HU3, HU4, HU5, EE5, LT3, LT6, LT7, LT9, LT10, LT12, LV7, PL3, PL5, PL6, PL9, RO1, SK1, SI1, SI5, SI7	HU1, HU3, HU4, HU5, EE5, LT6, LT7, LT10, LT12, PL3, PL5, PL9, SI1, SI4, SI5, SI7, SI8	HR5, HU5, LT10, PL1, PL4, PL9	HU1, HU3, HU4, LT10
Adopting an intersectional approach		HR4, HU5, RO1	HU5, SI8	HU5, LV6, PL1, PL10, RO8	
Implementing gendered innovations	LT10	LT3, LT10, PL2	LT10	LT10, PL7, PL8	LT10
Monitoring inclusive gender equality	LT6	BG5, LT6, SK6	LT6, SK6	RO7	

The literature identified by the experts in all countries abundantly covers the topic of initiating change and sustaining and deepening change with most publications focusing on the implementations of the GE measures in higher education and other public research performing institutions (see Table 2). Other topics are covered in significantly lesser amount.



The publications on monitoring inclusive gender equality mostly deal with annual data monitoring and reporting. The topic of adopting intersectional approach is not exhaustively developed as such in the literature, but the selected publications discuss issue of diversity in context of gender equality and examine deeper some specific grounds of discrimination in connection with gender inequality (such as sexual orientation). However, we could esteem that this topic generally remains unaddressed or under-addressed, which is also the assessment of national experts (see Table 4 below). The same could be stated regarding implementing gendered innovations, with an exception of few studies that mention this topic in HE institutions and private companies working in R&I. The type of organisations that are least covered are research funding institutions and NGOs and other non-profit research performing organisations.

As described in the INSPIRE D2.1 KSH2 Report, the publications that discuss GEP as a mechanism predominantly deal with the creation and development of GEP rather than its implementation and monitoring (Krzaklewska et al. 2023, 62). Most countries have just recently started to introduce GEP and have neither a long history of working on GEP nor the research on their effectiveness. They are often not grounded in the previous institutional policies or measures, but mostly follow blueprint of EU projects. There is a noticeable focus on “safer areas” of implementing GE such as WLB, and distinctive lack of developed measures in more “complicated” GE measures, such as sexual harassment. Gender dimension in research and teaching is less pronounced in GEPs. Similarly, the intersectional approach is barely included in GEPs (ibid).

Significant portion of the literature selected by the national experts did not relate directly to the issue of institutional change fostering gender equality in R&I organisations, but rather discussed other topics relating to GE issues relevant for understanding social, cultural, political and economic context of the countries in question (see Table 3). This literature provides basic data on increasing participation of women in academia across different countries (Krzaklewska et al. 2023, 52). Results mostly underline that share of educated women equals men, nevertheless women are still largely absent from STEM and leadership positions in general. Vertical and horizontal segregation including gender pay gap are also widely covered. Literature from Central and Eastern Europe also underlines that participation of women and other indicators relevant for GE are comparable with European trends, and sometimes better, especially in Slovenia, Estonia, Hungary and Lithuania. Exception is literature from Czechia which reports on low proportion of women researchers (ibid). Furthermore, the selected literature offers analysis of the structural conditions for academic progress and excellence through a gender perspective. It points that the seemingly neutral structural conditions for achieving science excellence and career progress, are in fact conformed to male habitus, particularly on the issues related to international networking, travelling or stay abroad, and continuous publishing track (ibid, 53).

Among the publications not directly addressing the issue of institutional change in R&I sector, many discuss political atmosphere of respective countries as being “anti-gender” (meaning inclined against gender equality). This literature examines negative attitudes towards the term “gender” and what is negatively perceived as “gender ideology”, which are relevant factors hindering the institutionalisation of gender equality policies in general (see Table 3). This recurring topic within the literature selected by the national experts is discussed in detail in



INSPIRE project Deliverable 2.1 KSH2 Report, in the sections written by the ZRC SAZU team (Krzaklewska et al 2023, 53 – 54, 59, 61).

Table 3. Selected literature which is not directly addressing institutional change towards gender equality in R&I organisations

Topic	Literature not addressing institutional change towards gender equality in R&I organisations
Negative attitudes towards “gender”	BG1, BG2, BG4, BG9, BG11, LV2, RO2, RO5
Other topics	BG8, BG12, HR3, HR8, EE1, EE6, LT4, LV1, LV3, LV4, LV5, RO3, RO9, RO12, SK2, SI6

The degree of sufficiency of the current knowledge base on structural change towards (inclusive) gender equality in R&I organisations for each of the five topics in the eleven countries is assessed by the national experts as outlined in Table 4. The table shows how national experts assessed whether current knowledge base on structural change in R&I organisations in the country is adequate to support significant evidence-based advances in the field of inclusive gender equality in R&I organisations. The possible answers ranged in from highly adequate to highly insufficient.

Table 4. Assessment of current knowledge in the country, by topic

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Bulgaria	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Croatia	Insufficient	Insufficient	Highly insufficient	Highly insufficient	Insufficient
Czechia	Highly adequate	Insufficient	Highly insufficient	Insufficient	Insufficient
Estonia	Highly adequate	Insufficient	Insufficient	Insufficient	Insufficient
Hungary	n.a.	Highly adequate	Highly insufficient	Highly adequate	Insufficient
Latvia	Insufficient	Insufficient	Highly insufficient	Insufficient	Highly insufficient
Lithuania	Insufficient	Insufficient	Insufficient	Insufficient	Insufficient
Poland	Insufficient	Highly insufficient	Highly insufficient	Insufficient	Insufficient
Romania	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Insufficient
Slovakia	Insufficient	Highly insufficient	Highly insufficient	Highly insufficient	Highly insufficient
Slovenia	Highly adequate	Insufficient	Insufficient	Highly insufficient	Highly insufficient

It should be noted that some of the assessments of the national experts (as presented in Table 4) do not fully conflate with the evaluation of topic coverage by countries conducted by the ZRC SAZU team on the basis of the suggested literature (as presented in Table 2). This should not come as surprise as both tables present results which are prone to subjective



understanding of each topic and different benchmarks different researchers apply to estimate existing knowledge base.

3.2 Initiating change

Degree of uptake of GEPs

This section provides the analysis on the degree of institutionalisation of GE and implementing structural change through the use of GEPs or alternative instruments to assure change in the field of GE. The analysis is made by the type of organization: Research funding organizations (RFO), Higher education institutions (HE), Research performing organizations (RPO), private companies and non-profit NGOs.

RFOs – The experts from five countries out of eleven declared that most of RFOs have GEPs (Estonia, Hungary, Romania, Slovenia and Poland), while in Chechia, Lithuania and Latvia – some RFOs have GEPs. In Croatia, Bulgaria and Slovakia GEPs are least developed and institutionalised among RFOs.

The situation is much better for **HE institutions**, as most of them have GEPs in all of the countries.

RPOs are slightly a different case, as in seven countries (Hungary, Chechia, Romania, Lithuania, Slovakia, Slovenia and Poland) most of RPOs have GEPs, in tree countries some have GEPs (Bulgaria, Latvia, Estonia), while Croatia is the only country where a few or none of the RPOs have GEPs.

For **private companies**, and **NGOs** and other non-profit organizations, the experts were often unable to give an answer as they reported a lack of reliable information. From the data they provided, we can say that private organisations are more advanced in implementing GEPs, particularly in Romania, where most of them have GEPs, while in Estonia, Hungary, Lithuania, Slovakia, Latvia some have GEPs and in Croatia, Bulgaria, Czechia and Slovenia – a few or none have GEPs.

In regards to the NGOs, experts from five countries (Estonia, Croatia, Lithuania, Bulgaria, Poland) reported a lack of reliable information. No national expert reported that that most or many NGOs have GEPs, leading to the conclusion that the GEP is not widespread mechanism in this type of organisations. Experts from Czechia, Romania, Slovakia and Latvia indicated that few or no NGOs have GEP. In Hungary and Slovenia, the situation is slightly better than in other countries, as some of NGOs have GEPs.

A collected overview of the prevalence of GEPs in the five different types of organisations is given in Table 5.



Table 5. Degree of uptake of GEPs by type of R&I organisation

Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Bulgaria	A few have GEPs	Most have GEPs	Some have GEPs	A few have GEPs	n.a.
Croatia	A few have GEPs	Most have GEPs	A few have GEPs	A few have GEPs	n.a.
Czechia	Some have GEPs	Most have GEPs	Most have GEPs	A few have GEPs	A few have GEPs
Estonia	Most have GEPs	Most have GEPs	Some have GEPs	Some have GEPs	n.a.
Hungary	Most have GEPs	Most have GEPs	Most have GEPs	Some have GEPs	Some have GEPs
Latvia	Some have GEPs	Most have GEPs	Some have GEPs	Some have GEPs	A few have GEPs
Lithuania	Some have GEPs	Most have GEPs	Most have GEPs	Some have GEPs	n.a.
Poland	Most have GEPs	Most have GEPs	Most have GEPs	n.a.	n.a.
Romania	Most have GEPs	Most have GEPs	Most have GEPs	n.a.	A few have GEPs
Slovakia	A few have GEPs	Most have GEPs	Most have GEPs	Some have GEPs	A few have GEPs
Slovenia	Most have GEPs	Most have GEPs	Most have GEPs	A few have GEPs	Some have GEPs

Stakeholders for GEP development

The most significant top-down incentive across different types of organisations is a new eligibility criterion in the form of the requirement to have GEP in place when applying for Horizon Europe funds. This is particularly the case in the countries that do not have adequate legal and policy frameworks, thus, the external EC requirement, EU projects and international cooperation are the main facilitators (e.g., Bulgaria, Slovakia, Czechia, and Latvia). As an illustration, only in one year about fifteen universities (out of 52) and a number of Institutes of the Bulgarian Academy of Sciences as well as other RPOs developed and adopted their GEPs. Experts report that the setback of the development and adoption of GEPs under the pressure, which resulted in a lack of substantial understanding of the measures and needs of each particular national and institutional context.

Regarding specific trends, in Croatia the importance of GEP and GE activities is mainly limited to the fields where women are underrepresented, especially in the STEM field. Similarly, in Lithuania, the focus is on the organisational culture and the promotion of women's participation and advancement in STEM (Šidlauskienė and Butašova 2013, p. 66). In Hungary, the expert reported a lack of positive change in the field of GE, with the consequence that GEPs are not widespread (Tardos and Paksi 2021). GE is promoted mainly within the discourses, initiatives and policies related to family and care, as a result of the conservative politics (Striebing et al. 2020, 8). In Bulgaria, the institutionalisation of GEP as the mechanism for GE is developing



slowly, relying on the small teams, departments or other parts of institutions, and is highly fragmented and temporary. In Czechia, due to the pressure of eligibility criteria, several institutions have adopted GEP, but only half of them meet all the mandatory requirements set by the European Commission, due to a lack of understanding of the topic (Donovalová and Tenglerová 2023, 9). It is interesting that in Romania, there is a network that brings together both public and private R&I organisations, which stands out from other countries in the cluster where private organisations are largely separated. The institutionalisation of gender studies programmes and curricula has been an important support to the positive trends in GE in Romania (Tăriceanu 2022). In Slovenia, the importance of intersectional approach is emphasised, as well as the focus on both genders and different groups of academic staff (including administrative staff) in adopting and implementing the GEP and changing the organisational culture (Mihajlović Trbovc et al. 2022). In Poland, the experts emphasised the importance of a bottom-up and inclusive approach (by involving different staff members) in the development of GEPs as a way of tailoring GE measures to needs and problems specific to the institutions. In both Slovenia and Poland, there is an emphasis on a need to create a wider network of actors (CoPs) working together for the change in the area of GE, as working on this topic often requires external support or support from the institutional peers. In Latvia, a lack of focus on discrimination and inequality is noted by the expert. However, the positive aspect is the internationalisation of labour market, which fosters diversity management. The most important need is to continue with the activities related to the Istanbul Convention in the areas of sexual, physical, emotional, financial violence and health.

Newcomers in relation to implementing GEPs

All of five types of organizations in the cluster countries just recently start to implement GEPs. In almost all of the countries, RFO are newcomers that have no widespread systematic development and adoption of GEPs (exactly in eight of them; Estonia, Bulgaria, Czechia, Slovakia, Slovenia, Poland, Lithuania and Latvia). Only in Croatia and Romania they are not newcomers, while in Hungary the expert could not give an assessment. HEIs are newcomers in most of the countries (10 out of 11), namely in Estonia, Croatia, Bulgaria, Czechia, Romania, Lithuania, Slovakia, Slovenia, Poland, Latvia. Hungary stands here as an exception. RPOs are newcomers in 9 out of 11 countries: Estonia, Hungary, Czechia, Romania, Lithuania, Slovakia, Slovenia, Poland and Latvia. This data is in line with the situation presented above on the level of development of GEPs, where the HEIs are the most involved in initiating change while RPOs right after them. The experts could not always report about the situation in private companies and NGO organizations (Poland, Lithuania, Estonia, Czechia, Romania, Latvia, Hungary). From the scarce data provided, the private companies are considered newcomers in Estonia, Lithuania, Slovakia, Slovenia while NGOs are newcomers in Hungary, Slovakia, Slovenia.

In general, GEP is a new tool in the Central East Country Cluster and organisations do not have much experience with it. In accordance to the expert's report, Croatia is the only exception among all countries in the cluster, where RPO, private companies and NGOs are not newcomers. In Bulgaria, Slovakia and Slovenia all types of organisations are considered as newcomers in the national experts' reports. This confirms Slovakia and Bulgaria as two countries that are not introducing GE policies in the field of R&I. To quote the expert from Bulgaria, "developing and implementing GEP is something entirely new for the research



community in the country. There is no any essential reference or specifically elaborated requirements regarding GE in their rules, procedures, etc.”

In most countries, the newcomer status, especially in HEIs and among RPOs is due to the fact that before the GEP became an eligibility criterion in the Horizon Europe, only a few organisations had GEPs or other policies directed at gender equality. Experts reported that in the period after August/September 2021, the number of GEPs in R&I organisations increased significantly. Consequently, most of the GEPs were adopted in 2021 and 2022. For example, in Croatia, the number of organisations (regardless of a type) who adopted GEPs increased from a few to more than ten. In the majority of countries, this happened mainly in HEIs and RPOs participating in the EU-funded structural change projects. However, the case of Bulgaria reveals that such a way of developing and implementing GEPs could be largely seen as fulfilling the formal obligation and in result lacking a substantial systemic approach to GE. This reflects a risk that the GEPs could be developed in haste and without a thorough need-analysis. The processes of developing and implementing GEPs in the private sector are very heterogeneous, since private companies are not part of the centralised system of public R&I organisations. The experts warned that there is a risk that development and implementation of GEP in this sector could be driven by profit rather than value of equality.

Table 6. Type of organisations as ‘newcomer’ implementing GEPs

Country	Research funding organisations	Higher education institutions	Other public research performing organisations	Private companies working on R&I	Non-profit research performing organisations
Bulgaria	Yes	Yes	Yes	Yes	Yes
Croatia	No	Yes	No	No	No
Czechia	Yes	Yes	Yes	n.a.	n.a.
Estonia	Yes	Yes	Yes	Yes	n.a.
Hungary	n.a.	No	Yes	n.a.	Yes
Latvia	No	Yes	Yes	n.a.	n.a.
Lithuania	Yes	Yes	Yes	Yes	n.a.
Poland	Yes	Yes	Yes	n.a.	n.a.
Romania	No	Yes	Yes	n.a.	n.a.
Slovakia	Yes	Yes	Yes	Yes	Yes
Slovenia	Yes	Yes	Yes	Yes	Yes

Alternative instruments to GEPs

In the majority of the countries, in all the types of organisations, **alternative instruments are not widespread**. The relative exception are the private companies in which international involvement/headquarters tend to adopt "Diversity, inclusion and equity/equality" strategies that serve as an alternative GE instruments. In terms of countries, the relative exceptions are Latvia (for HEIs, private companies), Romania (HEIs, private companies) and Hungary (RFOs, private companies). When looking at the type of alternative instruments, there are the university constitution, code of ethics, and diversity and inclusion plans. In Hungary, such plan



concerns the alternative instruments that target scholars who are on parental leave through rising the age limit for application for funds or through providing special publication grants.

Main barriers and facilitators for initiating change

The main barriers and facilitators for initiating change are presented in this section across the different types of R&I organisations.

RFOs – The national experts reported the main barriers to initiating change in RFOs in their respective countries. The most frequently mentioned barriers are: 1) a lack of awareness of the importance of GE, 2) lack of knowledge and absence of experts on gender equality and structural change within the organisation 3) lack of systemic approach 4) lack of initiative on the stakeholders, 5) lack of interest of the top management 6) regulations related to GE that are not binding or regulations that are not explicit enough 7) lack of official commitment by decision-makers, 8) lack of human and financial resources, including financial support from the state 9) lack of gender audit. In regards to the respective countries, a more specific case is Hungary. Due to the profound conservative backlash, gender-related education had been removed from the curricula while gender equality movements silenced in the public and political arena. The expert from Poland pointed to a lack of collecting gender-disaggregated data at the organizational level. Bulgaria and Slovakia stand out for the lack of sufficiently supportive legal and policy framework. In Czechia and Estonia, despite the existence of a policy framework, there is a lack of the actual support for GE agenda in practice. In Bulgaria, Slovakia and Poland, experts indicated the negative public representation of the so-called gender-discourse and the political mobilisation against the so-called gender ideology. The expert from Slovenia also referred to the current socio-historical context, where the focus on gender equality is perceived as a matter of trend or fashion.

The main facilitators for initiating change in RFOs are, first and foremost, supportive national legal and policy frameworks, in particular the GEP eligibility criterion for EU funding. This is followed by a strong commitment from top management and the push from gender experts within organisation. National experts also identified peer pressure as an important facilitator. Other funding mechanisms that support GE, such as research award initiatives like those of Avon's and L'Oréal's could also act as facilitators. Individual engagement was also ranked highly as a key facilitator due to the lack of systemic approach. It is interesting to note that the same factors and actors can be simultaneously perceived as barriers and facilitators, in particular the commitment of top management or pressure from actors in academic community. In Slovakia and Romania, and partly in Latvia, experts report a lack of adequate legal and policy frameworks, while in Hungary and Bulgaria experts highlight the political pressure against "gender ideology." Facilitators are mainly external, first and foremost GE criterion for EU funding.

HEIs – the main barriers for initiating change are similar to RFOs, but with some differences. They were again ranked by us according to their frequency in the experts' reports and their relevance. The most important barriers were a lack of awareness and understanding of gender equality issues and a lack or absence of financial support for the introduction of GE measures. They also pointed to a lack of systemic approach in developing and adopting GE measures, which results also from a lack of resources and capacities in terms of expertise, overwork of teaching and administrative staffs, and a care labour. Another important set of barriers relates



to institutional characteristics and include complex administrative system, rigid vertical hierarchies, systemic inertia and a lack of commitment on the part of the mid-managers and senior academic staff. A particular obstacle to change is the lack of mandatory measures by the governing bodies, evaluations and sanctions for non-compliance with GE regulations. Another problem is the discourse of meritocracy, which assumes that HEIs are gender-neutral organisations, especially in the case of the institutions with high number of female employees. The expert from Romania emphasised the need for a better definition of terminology related to GE and missing mandatory actions in the internal procedures, as well as a lack of sex/gender disaggregated data collection as an institutional practice. In Slovakia, the lack of gender-related expert knowledge was highlighted. In Slovenia and Czechia, the initiating changes in the field of GE is often perceived as the pressure "from above."

The main facilitators are similar to those for RFOs. Primary, the supportive national legal and policy framework, in particular GEP eligibility criterion for EU funds, is the most mentioned factor by national experts. Experience from the EU projects and international GE communities is listed as second. However, the main difference to the RFOs is the importance of enthusiastic staff at different levels of the R&I organisations (senior management, administrative staff, teaching staff). In particular, the younger generations of academic staff and students (especially in regards to actions around sexual harassment and gender-based violence) are seen as important facilitators. Experts also mentioned the importance of COPs and other networks in initiating change. This was particularly the case in Bulgaria, where the expert noted the importance of external factors – strong international academic and research networks and initiatives on GE, the presence of GE experts within the networks and a strong support from colleagues from more advanced countries.

RPOs – Main barriers are almost the same as in the HEIs, with the small exceptions. For example, in Czechia, compared to HEIs, RPOs are less targeted by the public policy framework, which means a less state-funded support and consequently, a lack of experts in GE and the number of staff dealing with this issue. In Poland, the small size of the research performing organisations can be a barrier. In Slovenia, additional barrier is the economic austerity, an inability to reconcile work and private life and institutional focus on competition in achieving the scientific excellence.

Main facilitators are almost the same as for HEIs, stressing a supportive legal and policy framework to initiate change and in the recent years, GEP as the eligibility criterion for the EU fundings. In Poland, being a small size organisation is also a positive circumstance, due to the relatively simple decision-making structure compared to the larger systems such as universities. The expert from Hungary noted a lack of basic information on facilitators in the case of RPOs. However, this is not an isolated case, as the majority of the experts either simply replicated the answers they gave for HEIs or reported a lack of knowledge about the situation in the RPOs.

PRIVATE COMPANIES – As these organisations are more heterogeneous, the main barriers relate to the lack of a legal and policy framework that encourages the implementation of GE measures and, as a result, a general lack of interest in GE issues. In addition, there is a lack of external pressure and mandatory measures, which, similarly, creates an urgency to develop GE measures. The experts also reported a lack of gender expertise in the organisations and a lack of resources allocated to ensure GE objectives in the small and medium-sized R&I



companies. There is also a lack of systematic monitoring of gender equality, which often results in the declarative dedication to gender inclusivity that masks the resistance and persistence of gender stereotypes.

Main facilitators are clear regulations and structural support. The more specific facilitators are the H&R departments and top management due to the international structure of the corporative organisations. Another facilitator is the importance of GE for the company's public image and the peer pressure from other companies. As the Bulgarian case shows, there could be a transfer knowledge between public and private organisations, since, especially in the case STEM, academic staff are often employed in both types of organizations (private and public).

NGOs – In most of the countries, experts reported that the main barrier is no formal incentive to initiate change in the area of GE. The main problem is often an undefined formal position of NGOs within the research ecosystem. As they are usually small organizations, they suffer from a constant lack of stable funding to support their work and a lack of structural capacity and resources, as well as the precarity of staff.

As for other types of organisations, experts indicated stable public funding and mandatory GEP as the main facilitators. However, the difference in the case of NGOs is their openness to the international funding and more visible peer pressure. The important drivers for change are the NGOs specialising in the GE issues, although, as expert from Bulgaria indicated, there are just a few NGOs active in the field of R&I.

3.3 Sustaining Change

Stakeholders for and against sustaining change

The national experts provided the assessment of the stakeholders acting for and against structural change in their countries. The similarity across countries and types of organisations is a visible reliance on the individual efforts, either by managerial staff or researchers themselves, mainly gender scholars and GE officers. State institutions, such as ministries and state bodies are relatively rarely mentioned as actors of structural change, but the institutional bodies as stakeholders for the change are noted in Romania, Slovenia, Latvia and Lithuania. A notable exception is Romania, where the Executive Unit for the Financing of Higher Education, Research, Development and Innovation (UEFISCDI) is the leading stakeholder for initiating and sustaining change in the field of GE. In terms of the main actors against structural change, the highest ranked are the conservative political parties and public actors, which does not provide a condition for working toward structural change in the field of GE. The most often mentioned stakeholders against structural change are senior academics and senior managers, and sometimes even policy makers.

In terms of country-specific stakeholders, in Estonia, for RFOs, HEIs and RPOs, the main stakeholders for structural change are the people and bodies (mainly HR offices) engaged in the field of GE, such as gender studies' researchers and scholars. Senior academics and senior managers are the stakeholders that stand against structural change. There are no explicit stakeholders mentioned in relation to private organisations and NGOs.



In Croatia, the actors supporting structural change are, similarly, the institutions and communities working on GE issues, but also trusted politicians and scientific community. In the HEIs, student organizations are an important stakeholder for structural change. In private organisations, employees can be both important stakeholders for and against structural change. Traditional business interest groups act against structural change. In the case of NGOs, in management may be people working for and against structural change.

As in the other countries in this cluster, the main stakeholders for the structural change in Hungary are gender scholars and researchers, especially young researchers. Political parties and top management are two actors that resist structural change.

In Bulgaria, in RFO and HEIs, the main stakeholders supporting structural change are policy makers, researchers, students and local communities, but also professional associations and trade unions. For RPOs, they also include clients of research services, industries and national economies. For the private organisations and NGOs, their owners, partners, employees and clients. The same stakeholders, however, can also work against structural change. In the RPOs, it is the researchers from specialised or prestigious STEM fields who oppose structural change. Regardless of the type of organization, nationalist political parties and homophobic and radical movements are the leading stakeholders against the change.

In contrast to other countries in Czechia and Lithuania, the main actors are the institutional bodies: the Centre for Gender and Science (Czechia) and the Office of Equal Opportunities Ombudsperson (Lithuania). In Czechia, the stakeholders acting for change in RFOs are the mid- managers, internal staff working with proposal evaluators and the applicants themselves, while for the HEIs and RFOs, the policy makers and organisations offering expert support in the field of the GE. The main stakeholders against structural change are the senior academics, top and mid-managers in the organisations. Lithuania is a unique case, as there are no stakeholders who would openly oppose the structural change in the R&I sector. However, the conservative politics promoted by certain NGOs and political figures are important stakeholders against the change.

In regards to the RFO, in Romania there are no stakeholders against structural change while the main stakeholder for the change comes from the RFO itself. The situation is different in the HEIs and RPOs, where change is driven by the bottom-up pressure from students and junior staff, as well as actors involved in the EU cooperation, and the social movements in the field of GE. Structural change is opposed by top management and administrative staff, the former because of the rigid hierarchies and the later because of a workload, and consequently, a lack of initiative. Another important factor is the conservative turn of the main political parties, in particular the appointment of top management by the governing parties. In private companies and NGOs, international partners are the main proponents of change, while top management and administrative staff are the main opponents.

In Slovakia, the situation is quite similar across the organisations: for RFOs, HEIs and RPOs, the European Commission and gender experts are the main stakeholders for structural change while in private companies and NGOs it is the international headquarters. Regardless of the organization type, the policy makers, top managements, senior researchers and the conservative political parties oppose to change.



In Slovenia, for RFOs, HEIs and RPOs, the main stakeholder for change is the Commission for Equal Opportunities in Science, an advisory body to the Ministry of Science. In HEIs, however, there are also student activist organisations, while in the case of RPOs it is gender scholars. In the RFOs, the systemic inertia of the top management structures, but also the right-wing personnel and political priorities stand against structural change. In HEIs and RPOs, the opponents of structural change are senior researchers or senior members of academic staff, who tend to protect their positions. In the case of the private companies, women-related initiatives and associations (particularly in STEM) are the main proponents of change, while the opponents are the associations of employers of Slovenia that prioritises profit and advocate legal interpretations that prevent greater inclusiveness. In the context of NGOs, the strongest initiatives for structural change in GE are activist organisations, especially feminist initiatives. Against the structural change are some Catholic Church-related organisations/NGOs and right-wing political actors that oppose gender equality and LGBTIQ rights, using the discourse of “gender ideology”.

The situation with regards to the stakeholders against structural change in Poland is similar, these being right-wing NGOs regardless of the type of organisation. In the case of private companies, top and mid-managers are indicated as additional stakeholders against structural change. As far as for the stakeholders that support change, those are mainly GE experts and practitioners. Administrative staff engaged in GE topics in the case of RFOs, trade unions and students' bodies for HEIs while the GE bodies in the case of RPOs are additional actors for change. In private companies, the top management can be both a stakeholder for and against structural change, while the employee networks and international boards support the change.

In Latvia, as the main stakeholders are listed the institutional bodies: Ministry of Welfare of the Republic of Latvia, Ministry of Science and Education of Latvia, European Commission (for RFOs), Gender Studies Institute of the University of Latvia (for HEIs) and Institute of Economics of the Latvian Academy of Sciences (EQUALS-EU project) (for RPOs). Stakeholders against change are political parties, policy makers, top management and employees who lack understanding of the importance of GE. As for the private companies, GE research institutes are important for structural change, while for NGOs, the social movements and activists. Top management is against structural change in private companies, while NGOs face societal pressure against change.

Impact of socio-cultural, political and economic contexts on institutionalisation of GE in R&I

The proposed literature on the socio-cultural, political, and economic contexts that impact the institutionalization of GE in R&I in the Central and East country cluster focuses mostly on barriers and much less on facilitators, as described in INSPIRE D2.1 KSH2 Report (Krzaklewska et al. 2023, 49). These hindering factors are (1) negative connotations associated with the term ‘gender’ within local politics (so called “anti-gender ideology”); (2) cuts in research funding and low awareness of gender related issues among the policy-makers; (3) institutional culture that unfavourably perceives institutionalisation of GE policies; (4) neoliberal turn in academia, which fosters precarious working conditions producing gendered inequalities; (5) traditional and conservative gender norms and unequal distribution of reproductive and care-work” (Krzaklewska et al. 2023, 56). While supportive factors are rarely explored, there are a couple of articles (from Slovenia and Hungary) highlighting as positive



the historical legacy of the socialist structural and employment conditions that enabled traditionally high female participation in labour market and academia in these countries (such as such as paid parental leave, affordable public nurseries, and kindergartens). Another article from Hungary reports also on current policies and structural conditions, which support female participation in academia, although they stem from politics and policies, which are ideologically opposed to the concept of GE. These are current family friendly governmental policies, such as work-life balance measures and conditions enabling flexible career trajectories.

Main practical lessons and good practices

Practical lessons from GE interventions in the countries of Central and East Europe show that the most successful practices of institutionalisation stem from EU funded projects and putting GEP as the eligibility criteria for Horizon Europe funding, which helped build local expertise and tools. The pitfalls of sharp increase in GEPs across the region are lack of quality in such institutionalisation efforts, lack of genuine institutional (and national-level) commitment and lack of true understanding of the sources of gendered inequalities. Therefore, the concrete practical lessons from the literature suggested by the national experts point to importance of: (1) gaining wide consent of public opinion and institutional stakeholders, including both academic and supportive staff as well as students; (2) adjusting GE measure to particular institutional culture in order to change it from within; and (3) relying on cooperation of activist change-agents in form of communities of practices (CoPs). The literature suggested by the national experts maps the need for following GE measures to be further developed within the local context: (1) tools for gender-sensitive databases and data-gathering tools to be used in designing GEPs; (2) measures relating to sexual harassment; (3) different management models in order to ensure commitment to GE institutionalisation; (4) applying intersectionality through a prism of organisational positionality rather than identity; and (5) developing measures for including gender dimension in the content of research (Krzaklewska et al. 2023, 57).

Main barriers and facilitators for sustaining change

The main barriers and facilitators for sustaining change are presented across the types of R&I organisations:

RFOs – In terms of the main barriers to sustaining change, experts identified a lack of legally binding instruments, resources, competence, structural support and expertise. Most importantly, a lack of interest by top management, a lack of adequate competence and a general absence of experts, a weak knowledge on gender equality, as well as the absence of regular monitoring and external evaluations of gender equality achievements. The Slovenian expert also asserted a problem of change of government, which always leads to a shift in priorities and changing in the institution's leadership. In the same vein, Bulgarian expert pointed to a lack of political will to introduce GE dimension into national policies on research funding. Czechia and Slovakia stand out as sustain the change is still not on their agenda. In the case of Poland, experts reported a lack of adequate data to assess the main barriers for sustaining change for RFOs.



The main facilitators are supportive national legal and policy frameworks. Although national gender equality policy is weak, it is indicated by the experts as an important facilitator. EU policies and measures are identified as the most important facilitator. Apart from this, pressure from the academic community and international cooperation (in Bulgaria, Romania, Czechia); where collaboration within the international team helps to consolidate change.

HEIs – Experts reported that the main barriers are largely similar to those of RFOs: a lack of resources (financial or in personnel), inadequate structure of gender equality measures in relation to the needs of the institution (balancing student, teacher, administrative, managerial perspective). In addition, experts pointed out gender fatigue due to the workload of gender equality officers/practitioners, and the lack of legally binding instruments. Specifically, for HEIs is that sustaining change depends on the individual efforts and small groups, usually within EU projects (or teams, departments, faculties but never the whole institution) or other sporadic initiatives. Often the barrier is just a declarative support to the GEP eligibility criterion and other EU policies on GE without real engagement with the actual needs within the organisation. In newcomers' context, such as Bulgaria and Czechia, there is a lack of critical mass of people, institutions, initiatives, networks and support (including from the government and other public institutions) and resistance of the staff. In Romania, the expert reported a backlash in relation to gender equality with a public research sector being dominated by the patriarchal values.

Main facilitators are similar to those for RFOs – the supportive legal and policy framework. External support in the shape of Horizon Europe GEP eligibility criterion is an important tool to sustain initiatives, programmes and achievements. Participation in EU projects is also highly valued as it allows the national experts to gain GE experience through the exchange with the international colleagues. Mutual cooperation between HEIs is also an important facilitator, as it contributes to the institutionalization of GE-related practice.

RPOs – The majority of experts reported that the main barriers are similar to those in HEIs: a lack of legal framework and resources, work overload for leading actors in GE. For the newcomers (Bulgaria, Czechia, Slovakia), these are resistance from staff and management, a lack of resources and a low level of expertise in GE. The experts also noted the lack of a unified strategy for GE, as RPOs are often small units with diffused responsibility and fragmentation and no unified framework to sustain change. An additional barrier is the dependence on EU-funded projects, which does not allow for the long-term sustainability of structural change. In the case of Poland and Slovenia, experts also pointed out that without financial support there is no interest in sustaining change. The expert from Bulgaria also noted a lack of a strategic policies and adequate measures at the national level, as well as deficiencies in the regulatory framework, which perpetuate a low remuneration and social status of researchers, and limited participation in European programmes.

Main facilitators for sustaining change in RPOs are similar to those of HEIs: mandatory GEP and participation in relevant national and international networks, peer pressure from other RPOs. Experts also highlighted the importance of a bottom-up approach to GEPs and of involving staff and the entire academic community in the process of developing a GEP. Sharing good practises through different networks is evaluated as important. Some of the experts also did not mention any explicit facilitators or they lacked data.



PRIVATE COMPANIES – Experts identified many barriers, that are ranked here in terms of their importance: 1) Lack of an adequate legal and policy framework. In particular, a lack of legally binding instruments; 2) Inadequate financial framework and the problem of investment or profitability (initial costs, business organisation, etc.); 3) Lack of adequate staff and expertise as a result of a limited interest in keeping GE on the agenda; 4) Lack of interest from top management; 5) Lack of studies on the positive aspects of GE in the private companies, lack of adequate consulting services and poor cooperation between science and business; 6) Gendered market division and traditional understanding of gender roles. Experts occasionally reported a lack of data and lack of any audit/monitoring of the advancement of GE. In Romania, the expert referred to the patriarchal culture that influences companies' commitment to GE.

Main facilitators are: adequate national legal and policy framework, financial and other resources to support GE sustainability, and tax reduction (or other awards) for gender-responsible companies. An advantage of private R&I is the flexibility in searching for sustainable models due to the client-oriented and entrepreneurial approach. Training and participation in the wider networks of public and private HEIs and RPOs is also an important facilitator. Experts from Czechia and Slovenia also emphasised the changes in the labour market policies. In Romania, the GE and diversity record is an important part of building the public image and perception of a company, which can be a motivation for the management to sustain the change in this field.

As far as **NGOs** are concerned, there are several barriers: the most important is a lack of adequate legal and policy framework, but above all the lack of financial means, which is the strongest obstacle to keeping the topic on the agenda. Similar to RPOs, there is also the problem of dependence on projects, donors and diverse stakeholders, and the precarity of staff and staff turnover.

Participation in national and international networks and initiatives, together with relevant HEIs and RPOs are main facilitators. NGOs are often characterised as the type of organisation characterised by an inherent commitment to social change and activism. The most important thing, however, is that GE becomes the subject of project calls. This would allow the more focus on the gender budgeting within the institution, monitoring of progress and gender/sex disaggregated data. Some experts emphasised a lack of adequate data to assess the situation with regard to NGOs.

3.4 Intersectionality

Main barriers and facilitators for adopting an intersectional approach

The main barriers and facilitators for adopting an intersectional approach are presented in this section across the different types of R&I organisations.

RFOs – For this type of organisation, a lack of awareness of the topic of intersectionality is the most frequently cited barrier by the national experts. The second barrier is a lack of a detailed preliminary analysis to understand the needs and build policies on the prior knowledge. In some countries, the experts reported the political leadership and political climate that also led to resistance from management and administration. In particular, the conservative and right-



wing parties and radical movements against minorities and vulnerable categories were indicated in Romania and the understanding of the term “gender” as referring only to LGBT+ in Bulgaria.

Several experts indicated that there are no explicit facilitators in terms of RFOs. Others confirm the key role of legally binding measures that include an intersectional approach and the strengthening of expertise as the important facilitators. Other potential facilitators mentioned are: top management and bottom-up pressure from younger researchers and an external support in terms of the availability of sufficient of good examples in other countries. In Romania, the expert noted the importance of the appropriate knowledge to make staff more willing to create a broader platform of R&I organisations to promote an intersectional approach. Expert from Lithuania asserted that previous organisational activities related to minority issues (e.g. working with disability issues) can strengthen the intersectional approach.

HEIs – The main barriers identified by the experts were a total lack of knowledge and expertise on the topic of intersectionality. This led to a lack of institutional instruments, protocols and examples of good practice. The absence of structural support also means a lack of resources and staff to participate in the creation and implementation of intersectional measures. As for the specific cases, the language and terminology are indicated by the experts as important barriers. In Romania, there is a lack of appropriate terminology related to the intersectional approach. In Slovenia, the discrimination towards non-Slovenian language speakers can be an important barrier. Another barrier is the lack of social awareness of the intersection of GE with traditionally-recognised categories of vulnerability (e.g. Roma, lower social strata, chronically ill).

As in the case of HEIs, several experts did not identify any explicit facilitators. The potential facilitators are initiative and support from senior management, involvement of relevant experts, an emphasis on monitoring, and the peer pressure from other HEIs. Experts emphasised a bottom-up facilitators, in particular pressure from students and junior staff, who tend to be more aware of intersectionality and are more motivated to facilitate change. The expert from Poland noted the role of internationalisation in raising awareness and sensitivity to this topic by employing more staff from different ethnic and socio-economic backgrounds.

RPOs – Several experts confirmed that the situation is the same as for HEIs in terms of the main barriers. The difference is that RPOs are usually specialised units that are independent, and this makes it difficult to create a common platform for the intersectional approach. Other barriers include a lack of interest, capacity, resources and expertise.

The main facilitators are also similar to HEIs, but several experts also confirmed that there are no explicit facilitators. Collaboration with the HEIs and other bigger “systems”, transfer of expertise and mutual support would be a particularly fruitful way of facilitating change.

PRIVATE COMPANIES – Lack of structural support and resources and absence of experts are identified as the main barriers. However, experts pointed out the specificity of private sector and the lack of information to assess the main barriers and facilitators.



Main facilitators: While the majority of the experts did not see explicit facilitators due to the lack of adequate legal instruments and lack of awareness, they also emphasised the role of top management and top-down approach, in particular, the globalised corporate culture of multinational companies that are open to diversity.

NGO – As in the case of private companies, several experts reported a lack of information to provide information about NGOs. The remaining experts noted no awareness and lack of interest in intersectionality as the main barriers. Another barrier is a lack of sufficient expertise and resources due to the project-based funding policies.

There are no specific facilitators identified by the experts. Potential facilitators could be participation in EU projects and external consultants. In Slovenia, some NGOs are the leading actors in providing knowledge on the intersectional approach, so they can play a more prominent role in the R&I sector in general.

In sum, there are no policies that build on an intersectional approach in the Central and East country cluster. However, in Lithuania and Slovenia, anti-discrimination measures are mentioned as the important channels for initiating change in this field of inclusive GE. The experts noted the minimal focus on and not enough knowledge of an intersectional approach. The main barriers are the rise of the right-wing politics, conservative backlash (Romania, Bulgaria), a lack of political support, for example, for the ratification of the Istanbul Convention (Latvia). For newcomers, the main barrier is a lack of awareness of the intersectional approach and, consequently, a critical lack of knowledge, resources and experts, thus of a know-how to develop and implement more sustainable initiatives and measures. Experts emphasise the importance of knowledge transfer and best practices from the more experienced institutions and other contexts. The issue of a lack of adequate terminology in local languages and the national language politics also stands out. Experts indicated the lack of adequate terminology, the problems with gender-sensitive language or the discrimination on the basis of language, as the important barriers to the implementation of an intersectional approach. The only exception is Romania, where the RFO is ready to adopt the intersectional approach. In regards to this, there is no particular difference between different types of R&I organisations. In terms of facilitators, researchers of younger generations are seen as important agents of change. There is more general view among the experts that the private companies can more easily apply the intersectional approach due to the international profile and diversity management.

3.5 Gendered innovations

The majority of experts reported a lack of relevant data to answer to this question and that, consequently, they did not report on advances in regards to gendered innovation. This topic does not seem to be relevant and addressed in the Central East country cluster. However, the private companies in Hungary, Latvia and Czechia have developed some initiatives. These are either multinational companies in the telecommunications or technology sector that occupy advanced positions in the market (in Hungary and Latvia). The visible exception is Romania, where advancement is fostered by the CoP that is formed in the private sector within the Diversity Charter or the Deloitte SheXO Club, which actively work toward inclusion and diversity. However, the discourse they use to promote GE is very neoliberal and profit-driven. Another obstacle to full understanding and implementing gendered innovation, as the Slovenian report describes, is the misunderstanding of the concept itself. It is usually



understood as increasing the proportion of women employed in the innovation sector and equating “gendered innovation” only with the innovation in STEM.

3.6 Data monitoring

In the majority of the countries there is no significant advancement in data collection and monitoring of change in R&I organizations. There is also a lack of relevant publications on this topic, as this is a relatively new field (as reported in [Latvia](#), [Estonia](#), [Croatia](#), [Bulgaria](#), [Czechia](#), [Poland](#)). However, due to the EU eligibility criterion and the rapid increase of number of GEPs, the collection and monitoring of gender-disaggregated data can be expected to become more present activity, as it is foreseen as an activity within GEP. For this reason, at this point, it is difficult to assess the current situation in monitoring, as the main results are to be expected in the coming years. Short-term data collection and monitoring of change has been usually been done through the EU-funded projects.

As for some specificities, in [Czechia](#), there is a considerable effort to introduce monitoring through an annual monitoring template to be filled in by, among others the Ministry of Education, Youth and Sports, other ministries, research funders, the Czech Academy of Sciences. In [Slovakia](#), since 2021, R&I has started to pay attention to the data collection and monitoring change. In [Hungary](#), [Romania](#), and [Slovenia](#), experts pointed out to limited efforts to collect gender-disaggregated data, in particular, they underlined that there is no systematically organised monitoring of the changes in R&I organisations at national level. The notable exception is [Lithuania](#), where the recent advance concerning data collection and monitoring change is reported. The requirement for “open organisational data” includes the collection of gender-disaggregated data on the monthly salaries (also in R&I) and required that these are published. There is also an impact of the EC requirement to publish gender-disaggregated data, which has been implemented by several HEIs in the Central East country cluster. In [Slovenia](#), the main change in this area has recently been brought about by EC measures mentioned above and the new national legislation, which requires from R&I to report on advances in the area of GE, and that is also part of the evaluation of academic institutions for the national funding. In Poland, RFOs, through the National Science Centre, has started to collect data on the gender distribution of applicants, winners of awards, and expert panels.



4 R&I Organisations

This cluster includes 898 higher education institutions, 4,468 public research performing organizations, and 19,030 private R&I enterprises. Numbers per countries are listed in table below.

Country	# HEIs	# Public RPOs	# R&I companies (estimation)
Bulgaria	51	17	100
Croatia	48	33	2000
Czechia	58	78	2772
Estonia	18	20	6
Hungary	63	3683	2305
Latvia	52	53	1533
Lithuania	18	16	356
Poland	426	239	5743
Romania	87	263	600
Slovakia	34	47	900
Slovenia	43	19	2715

The majority of higher education institutions are in Poland, with the fewest in Lithuania and Estonia. Surprisingly, Poland has significantly higher number of HEIs in comparison to other countries in this cluster. Some countries indicate that there are both public and private higher education institutions and universities. While most countries indicate that there are more public than private higher education institutions in their countries, this is not the case in Poland and Czechia.

The majority of public RPOs are in Hungary, with the fewest in Lithuania. Surprisingly, Hungary has significantly more RPOs as the other countries in this cluster. It is important to note that most did not include countries the number of HIEDs when listing RPOs, but some countries indicate that they did include them (Romania, Lithuania).

Most companies in the R&I private sector are located in Poland, and least in Estonia. It is interesting to note that Poland has four times more companies in the R&I private sector than other countries in this cluster on average. Of the three types of R&I organizations, countries note that reliable data on the number of companies in the R&I private sector is the most difficult to find and verify, as different sources provide different results. There are several reasons for this, such as the lack of standardized definitions, different sources using different criteria and definitions of what constitutes an R&I company, different data sources, and diverse methodological approaches to calculating the number of companies. Countries cite various types of methodological approaches, including calculating the appropriate percentages based on data from the articles, providing statistics on the number of researchers in the country - in public and private organizations, subtracting the number of state-owned enterprises from the total number of businesses, or searching various databases using the keywords such as "institutes" or "scientific research centre".



When asked to indicate the name of 2-5 companies in the R&I private sector in their countries, all indicated two or more companies, while two countries indicated five companies (Slovenia and Latvia) and three indicated four companies (Hungary, Romania and Poland).

5 Engaged stakeholders

5.1 Policymakers

Policy makers from this region are most engaged in three topics: initiating change, sustaining and deepening change, and monitoring inclusive gender equality. They are less engaged in the topic of adopting an intersectional approach and only few are engaged in implementing gendered innovations.

In Lithuania, no policy makers are engaged in structural change toward inclusive gender equality. In Hungary, only one expert was mentioned as engaged in the topic of initiating change. In Czechia and Romania, only two experts are listed, however, there is one expert in each of these two countries that is engaged in all five topics.

5.2 Research Funding Organisations

RFOs in this region are mostly engaged in topics of initiating change and deepening and sustaining change, and least engaged in implementing gendered innovations and adopting an intersectional approach. Romania and Slovakia listed the existence of one RFO engaged in structural change, while Hungary, Lithuania, Czechia listed two. Bulgaria listed three RFOs, which all deal with all five topics. Besides these three, there are four RFOs, one from Romania, one from Czechia and two from Latvia that have expertise in all five topics. Those RFOs that have expertise in monitoring inclusive gender equality, also have expertise in initiating, and deepening and sustaining change.

5.3 Research Performing Organisations

RPOs in this region are mostly universities and other public research performing organizations. There are only two private companies listed. The RPOs mentioned are mostly engaged in initiating change and monitoring inclusive gender equality and least involved in implementing gendered innovations. For Bulgaria and Latvia only two RPOs were mentioned and they are engaged in structural change towards gender equality. Most diverse expertise covering several topics have RPOs listed for Croatia and Czechia.

Otherwise, among all engaged stakeholders, RPOs have the most diverse expertise in general. In fact, six countries out of eleven, noted that there is at least one RPO that has expertise in all five topics, with Bulgaria and Latvia having two RPOs that have expertise in all five topics and Czechia, Romania, Croatia and Slovenia having one.



5.4 Communities of Practice

The four countries have highly engaged existing networks and / or associations, some of which are centrally placed and affiliated with strong organisations with a considerable reach of influence. These indicate interest and engagement across all five topics, with an overall emphasis on sustaining and initiating change and somewhat less on the other three topics.

Associations, networks, and CoPs in this region are mostly active in the area of initiating change and least active in the areas of adopting an intersectional approach and implementing gendered innovations. The experts from Bulgaria and Lithuania only listed one entity that is involved in the structural change towards gender equality, and experts from Hungary and Czechia only two. However, the Bulgarian Higher Education and Science Syndicate, a branch of the Bulgarian Trade Union, which is the only organisation mentioned, is an expert in all five topics. Croatia claims that all three listed entities have expertise in all five topics. Besides Croatia, there are five more entities that have expertise in all five topics: two in Romania, and one each in Slovakia, Czechia and the aforementioned Bulgaria.

Suggestions to support Communities of Practice

National experts suggested potential CoPs that would be suitable to be supported by the INSPIRE project. For the topic of initiating change, 7 potential CoPs were listed, gathering organisations from 5 different countries; for the topic of sustaining and deepening change, 6 potential CoPs were listed, gathering organisations from 6 countries; and for the topic of implementing gendered innovations, 5 potential CoPs were listed. The fewest potential CoPs are related to the topic of monitoring inclusive gender equality. In most cases these are nation-wide networks of GE practitioners.

A nation-wide potential CoP that covers largest number of topics is the network (Community of Change) led by the Centre for Gender and Science, Czech Academy of Sciences, which also leads the Gender in RDI within CZARMA working group (Czech Association of Research Managers and Administrators). This network is involved in topics: initiating change, sustaining and deepening change, and adopting an intersectional approach.

Some regional CoPs are covering several themes, among them one is already existing as a CoP, and two are project consortiums that are potential candidates for a CoP:

- GEinCEE, a CoP established as a part of ACT project, gathering institutions from Poland and several other countries, is involved in topics: sustaining and deepening change, adopting an intersectional approach, and monitoring inclusive gender equality.
- EQUALS EU (Europe's Regional Partnership for Gender Equality in the Digital Age, <https://equals-eu.org>), a Horizon Europe project involving institutions (one from Latvia) and Europe-wide associations, is involved in topics: initiating change, adopting an intersectional approach, and monitoring inclusive gender equality.
- SPEAR (<https://gender-spear.eu/>), a Horizon Europe project involving HEIs (two from Bulgaria) that already developed GEPs. Two Bulgarian consortium partners are developing nation-wide network, which is involved in all topics: initiating change, sustaining and deepening change, adopting an intersectional approach, implementing gendered innovations, and monitoring inclusive gender equality.



Not all national experts could propose CoP for all topics, which indicates that the field is far from saturated with such initiatives. It seems that not all national experts completely understood the concept of a community of practice, as they suggested singular organisations rather than group of organisations (i.e. association, network) as potential CoPs. Some experts indicated that there are potential CoPs, without providing information on them.

6 Training Resources

In all countries in this cluster, there are additional training resources in English that are not included in the GE Academy Training Repository or Inventory or the GEAR tool.

The topics they cover are the following:

- Guides for research stakeholders, implementing good practise and context-specific approaches
- Guides to prepare for training, workshops and/or research
- Guides to support universities to go beyond the formal adoption of a gender equality plan
- Toolkit to improve gender-sensitive PhD supervision for supervisors
- Toolbox for creating gender-sensitive exhibits
- Training resources and guidance to promote the commercial growth and social impact of women-led start-ups.

While the majority of experts understood the question on training resources to mean that there are materials and guides to help organize and deliver training, Hungary understood the question to describe community resources, such as networks that support GE initiatives, and indicated that there is an informal working group that supports those responsible for creating and implementing gender equality plans at universities and research institutions. Similarly, Czechia mentions that there is a Centre for Gender and Science, which has produced many materials in English and Czech and provided most of the training.

In all countries in this cluster, the experts indicated at least one training resource in the local language.

The topics they cover are the following:

- Manual for Gender Mainstreaming in general and also specifically in higher education
- Train the Trainer in Gender Equality and Active Citizenship
- Guides with instructions, advice and practical recommendations for initiating changes for gender equality in a higher education or research institution (and for implementing gender equality plans)
- Guide to preventing sexual harassment in the workplace
- Guide to introducing a gender-sensitive approach to research and teaching.

In Hungary, there are some experts who are engaged with the particular initiatives within the institutions, but these are not structured, long-term planned trainings, but rather one-time



events held to fulfil one of the requirements (specific objective) of the institution's GEP. Lithuania mentions the platform for trainings offered by the Office of the Equal Opportunities Ombudsperson on various topics, such as ABC on equality and non-discrimination for employees, ABC on equality and non-discrimination for employers, integration of the equality aspect in public services, guidelines for employers on the implementation of gender equality in the work environment, guidelines for equal opportunities plans.

7 Conclusions

We can conclude that the legal and policy framework in the Central East Country Cluster is inadequate. An increasing focus on work-life balance and care labour and gender-based violence is significant, but there is a risk that such improvements are a result of the shift toward the right-wing, family-oriented discourses, particularly in Poland, Romania and Hungary. The majority of the policy documents still keep a focus on heteronormative approach, with “women” and “men” as the main categories. However, there is a gradual shift towards the discourses of “gender equality” and “diversity.” In the majority of the countries, the legal and policy framework related to intersectionality can be considered as non-existent. There is a general lack of awareness of the importance of this topic and a lack of knowledge about intersectionality. In some countries, the conservative and radical right movements are actively working against minorities and vulnerable categories (Romania), while several experts reported on language-related issues and the lack of adequate terminology or, as in the case of Bulgaria, the misunderstanding of the term “gender” as referring only to LGBT+.

In terms of GE measures in R&I organisations, the major structural change has occurred in the last two years, due to the pressure of the EU eligibility criteria for the Horizon 2020 programme. In particular, HEIs and RPOs are witnessing the rapid increase in development and adoption of GEPs in the period from 2021-2023. RFOs are still less active in this respect. The “external” pressure proves to be the main facilitator for initiating change, but the development and adoption of GEPs under pressure has resulted in a lack of adjusting the measures to the needs of each particular national and institutional context. For this reason, there is a risk that GEPs will be adopted only declaratively, without an in-depth analysis of the needs and consequent steps towards structural change that would result in actual improvement of GE. With regards to the R&I policies in private companies, the experts could not provide a more elaborated assessment due to the lack of relevant data, which can be attributed to the fact that the higher education and research are still predominantly in the public ownership, probably due to the legacy of state or social ownership that prevailed in this region. The visible exception in this sense is Romania, where an integrate approach is taken: public and private R&I organisations form the network and collaborated on the issues of GE.

The majority of experts asserted that there has not been no relevant advance in data collection and monitoring change in R&I organisations. There is also a lack of relevant publications on this (Estonia, Croatia, Bulgaria). However, due to the EU eligibility criterion and the rapid increase in the number of developed and adopted GEPs, the collection and monitoring of gender-disaggregated data can be expected, as it is envisioned as an activity within GEPs. Therefore, the main results in this area are to be expected in the coming years. The topic of gendered innovation does not seem to be relevant and addressed in this country cluster. In



general, gendered innovation is understood as related exclusively to STEM field, which is quite limiting.

The lessons learned from the experts' reports are that the strong external support in the form of EU supportive policies through participation in international academic and research networks and initiatives on GE is the key facilitator, but can also be a barrier due to the lack of engagement with the actual needs in the particular national and organisational contexts – especially in terms of sustaining change. The volatile political and economic situation is also a reason for some countries to delay GE policies or to perceive them as issues of “lesser” importance. However, training and participation in the wider networks of public and private organizations, both within the national context and internationally is essential for initiating, sustaining and monitoring change in the field of GE.

Across the four countries, the emphasis is on initiating (except for Sweden) and sustaining and deepening change, with less on monitoring or adopting an intersectional approach. The two most underdeveloped topics are intersectional approaches and gendered innovation (in general) but in separate and distinct ways. Intersectionality is increasingly recognised as an important (new) area to integrate in order to achieve equality, diversity and inclusion, even if knowledge and examples are still scarce and the practice is imbued with insecurity and unclarity concerning ethical considerations. Irish and Swedish authorities, HEIs and some RFOs have taken initial steps to adopt intersectional approaches that in different ways may prove to be promising, but these are still at most gender and one other dimension and otherwise, where given due consideration, grounds for discrimination are primarily treated separately and not in combination (i.e., an additive approach). Legal and policy frameworks are overall inadequate and there is in general insufficient data, knowledge and hardly any practice examples. Furthermore, no real and practicable requirements are implemented (except to some degree in Ireland) and even where there is extensive legislation, practice is inadequate for the task, so it seems there is a fair share of ‘fumbling in the dark’.

Gendered innovations, in contrast, are in many cases not even understood as a systematic endeavour to take gender and other specific social categorisations into account in research, education and innovation content (e.g., data, methodology, design, execution, impact) in order to qualify and ensure applicability to the entire demography. Instead, it is often misunderstood as an issue of representation and equal access, and while these are important equality aspects, this erroneous conceptualisation of gendered innovations hampers systematic knowledge generation, awareness and recognition of the importance of gendered innovation. This is reflected in the very scant engagement in this topic across the four countries – and again here Sweden and Ireland are most advanced, for instance through RFO requirements implemented. There may be signs that some sectors (e.g., IT and Health), and some private companies are beginning to orient themselves to these perspectives, and this is largely due to a bottom-up demand and ever-so-slowly growing public recognition, due to popular dissemination and the wake of #metoo movements in Sweden, Finland and Denmark. The EU GEP requirement, matched with some Swedish and Irish RFO requirements, could initiate a systematic approach, fostering an evolving understanding, recognition, and practice.

Data collection and monitoring is likewise most advanced, systematic, comprehensive and embedded across the sectors in Ireland and Sweden, allowing for national and inter-institutional benchmarking and the growth of a body of knowledge to track and monitor



progress. As already mentioned, both Sweden and Ireland are gradually including data on additional discrimination factors. In Sweden, ensuring cross-coordination between gender and equal opportunities within their organisation, and, in Ireland, including race/ethnicity data in mandatory data collection and monitoring. Finland has the longest trajectory in data collection, even so, this is indicated as being focused more on collection than on systematic monitoring. It is also the case in Denmark, where data collection has only really been systematically implemented in preparation for the HEU GEP requirement, but a growing recognition and burgeoning practice is currently under way. Neither Finland nor Denmark therefore boasts the possibility for benchmarking. Across the types of organisations, in all four countries, HEIs, closely followed by RFOs, have the most advanced data collection and monitoring and are most comprehensively documented and subject to legislation, while NGOs are least so. Public and private RPOs along with NGOs and other non-profit organisations are to a much larger degree diversified and legal frameworks are perceived as not applicable. In general, inclusive gender equality efforts would benefit greatly from advancing this topic – most in Denmark and Finland, but also in Ireland and Sweden. Thus, continuous efforts are required to address challenges, improve data collection, ensure data transparency and accessibility, set standards, foster inclusivity (e.g., by providing disaggregated data in different social categories), data monitoring and expand monitoring efforts to include a broader range of organisations within the R&I sector across countries.

As for the uptake of GEP – or, especially in the case of Sweden, equivalent measures – HEIs and RFOs in Ireland and Sweden are well advanced and can no longer be defined as newcomers. While Finland has strong feminist movements and longstanding gender equality traditions and practices and has made considerable advances, GEPs seem to be somewhat less advanced and comprehensively embedded in comparison with Sweden, and even if most HEIs and RFOs have GEPs (and have had so for a while), all other Finnish organisations are defined as relative newcomers to GEP-efforts. In Denmark, the implementation of GEPs in HEIs and other organisations is a direct result of the HEU GEP requirement, and thus all Danish types of organisations are newcomers to GEP-work – and much more pronounced than in any of the other three countries in the cluster. However, there is evidence of a surge in interest, understanding and engagement in the work from a growing body of practitioners in the sector. The prevalence of GEPs grows scarcer in public and private RPOs in all four countries and it is difficult to obtain information about the prevalence of GEPs in NGOs and other non-profit RPOs.

In conclusion, one of the most striking characteristics of the Northwest country cluster is the fact that even if this cluster counts some of the most comprehensively advanced contexts for gender equality efforts at all levels in the world – Ireland and Sweden – these advanced practices coexist with urgent and perpetual needs for promotion, argumentation, awareness raising, education, training, capacity building, definition and upholding of legislative and policy requirements, continuous focus and handling of implicit and explicit resistance and backsliding. Even if this urgency and pressure here can seem less than in other contexts, and the road paved to some extent, it is still as real and pressing as in less advanced countries and contexts. One obvious conclusion from this is that advancement towards inclusive gender equality is not synonymous with a once-and-for-all elimination of the problem of inequality/ies. Instead, the spectrum between ignorance, blindness and resistance to inequality, on the one hand, and comprehensive and effective enlightened practices growing ever larger and more differentiated, on the other hand. This growth occurs alongside the development of a more



nuanced and high-quality knowledge base and an increasingly competent group of engaged actors. Therefore, it is important to remain vigilant and aware, as the threat of backsliding always persists.



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Annex

Table A

The list of legal and policy documents

Bulgaria	<ul style="list-style-type: none"> • The Equality between Women and Men Act, Bulgarian Parliament (2016). • Ministry of Education and Science, Republic of Bulgaria. National strategy for development of scientific research in the republic of Bulgaria 2017 – 2030 (Better science for better Bulgaria). 4. Policies, actions and measures for their implementation. Journal – Electrotechnica & Electronica (E+E), Vol. 52 (9-10), 2017, pp. 35-49, ISSN: 0861-4717 (Print), 2603-5421 (Online). • National Strategies for Promotion of GE - 2016–2020 and a new one for 2021-2027 (adopted in 2016 and 2020).
Czechia	<ul style="list-style-type: none"> • Office of the Government of the Czech Republic. 2021, Gender Equality Strategy for 2021–2030 (in Czech: Strategie rovnosti žen a mužů na léta 2021–2030), replacing a previous Strategy for Equality of Women and Men in the Czech Republic 2014-2020. • The National Research, Development and Innovation Policy of the Czech Republic 2021+ (Národní politika výzkumu, vývoje a inovací České republiky 2021+). • The Plan for Supporting Gender Equality 2021–2024 of the Ministry of Education, Youth and Sports.
Estonia	<ul style="list-style-type: none"> • "Estonia 2035" - a national long-term development strategy (2021)
Croatia	<ul style="list-style-type: none"> • Government of the Republic of Croatia, National Plan for Gender Equality for the period until 2027, March 2023, https://ravnopravnost.gov.hr/UserDocsImages//dokumenti/NPRS%2027%20APRS%202024//Nacionalni%20plan%20za%20ravnopravnost%20spolova,%20za%20razdoblje%20do%202027..pdf. • Action plan for the implementation of National Plan for Gender Equality until 2024, https://ravnopravnost.gov.hr/UserDocsImages//dokumenti/NPRS%2027%20APRS%202024//Akcijski%20plan%20za%20ravnopravnost%20spolova%20za%20razdoblje%20do%202024..pdf. • GEP – Institute for Social Research in Zagreb (https://wwwadmin.idi.hr/uploads/IDIZ_Plan_rodne_ravnopravnosti_GEP_2436b76b36.pdf). • GEP – Institute "Ruđer Bošković" (https://www.irb.hr/content/search?selector=on&searchText=ravnopravnost+spolova&searchSort=score). • GEP – Institute for Medical Research and Occupational Health (https://www.imi.hr/wp-content/uploads/2022/01/Plan-rodne-ravnopravnosti.pdf).



	<ul style="list-style-type: none"> ● GEP – Institute of Oceanography and Fisheries (https://acta.izor.hr/wp/wp-content/uploads/2022/10/Plan-rodne-ravnopravnosti-IZOR.pdf). ● GEP – Institute for Anthropological Research (https://inanthro.hr/wp-content/uploads/2021/05/Plan-rodne-ravnopravnosti-2021-23_HR.pdf). ● GEP – Croatian Geological Survey (https://www.hgi-cgs.hr/wp-content/uploads/2021/12/Plan-rodne-ravnopravnosti.pdf). ● GEP – The University of Split (https://www.ffst.unist.hr/download/repository/Plan_rodne_ravnopravnosti_UNIST-1.pdf). ● GEP – Juraj Dobrila University of Pula (https://www.unipu.hr/download/repository/Plan_rodne_ravnopravnosti_UNIPU_2023_web%5B1%5D.pdf). ● GEP – The University of Osijek (https://www.ffos.unios.hr/wp-content/uploads/2022/03/Plan-rodne-ravnopravnosti-Sveuc.-u-Osijeku-HRV.pdf). ● GEP – The University of Zadar (https://www.unizd.hr/Portals/0/doc/doc_pdf_dokumenti/strategije/Plan%20ravnopravnosti%20spolova%20-%20Senat%20-%20veljaca%202022.pdf?ver=6Z0SRXVXs6I%3D). ● GEP – University North (https://www.unin.hr/wp-content/uploads/Plan-rodne-ravnopravnosti.pdf). ● GEP – University of Dubrovnik (https://www.unidu.hr/wp-content/plugins/quaroscope/download.php?file=29675). ● GEP – Faculty of Teacher Education in Zagreb (https://www.ufzq.unizg.hr/wp-content/uploads/2021/12/Plan-spolne-ravnopravnosti-UF-a_12-2021.pdf). ● GEP – Faculty of Civil Engineering in Zagreb (https://www.grad.unizg.hr/images/50012344/Plan%20rodne%20ravnopravnosti.pdf), ● GEP – Faculty of Electrical Engineering and Computing in Zagreb (https://www.fer.unizg.hr/ravnopravnost/obavijesti?@=2ukho). ● University of Rijeka, Guidelines for gender sensitive communication. ● University of Rijeka, Guidelines for prevention and action in case of sexual harassment. ● Faculty of Electrical Engineering and Computing in Zagreb, podcast Women in Engineering, https://www.ieee.hr/ieeesection/interesne_skupine/wie#.
Hungary	<ul style="list-style-type: none"> ● The Action Plan "Empowering women in family and society" (2021–2030), https://kormany.hu/dokumentumtar?search=A%20n%C5%91k%20sze%20rep%C3%A9nek%20er%C5%91s%C3%ADt%C3%A9se%20a%20csatl%C3%A1dban%20%C3%A9s%20a%20t%C3%A1rsadalomban&limit_rows_on_page=8&limit_page=0.
Lithuania	<ul style="list-style-type: none"> ● Child Rights Protection Basis Law, Art. 1.18.4 amendment No. XIV-1033 21-04-2022, effective since 01-01-2023. ● Labour Code, Art. 133 amendment No. XIV-1189 of 28-06-2022 ● The Action Plan for Equal Opportunities for Women and Men 2023-2025.



Poland	<ul style="list-style-type: none"> • The Polish National Action Plan on Women, Peace, and Security 2018–2021. • National Programme for Equal Treatment for the years 2022–2030, July 2022.
Romania	<ul style="list-style-type: none"> • Standardised Guide regarding Sex-based Harassment and Moral Harassment in the Workplace, Governmental Decision, April 2023. • Governmental Emergency Governance 137/2000 for the prevention and sanctioning of all forms of discrimination. • Law 202/2002 on the equal opportunities and equal treatment between women and men. • Law 167/2020, provisions on moral harassment in the workplace. • Strategy for the promotion of equal opportunities and equal treatment between women and men and the combating of domestic violence 2022–2027, 2022. • The National Strategy for the Occupation of the Labour Force 2021–2027. • The National Strategy for Research, Innovation and Intelligent Specialisation 2021–2027.
Slovakia	<ul style="list-style-type: none"> • State Strategy for Equality between Women and Men and Equal Opportunities 2021–2027. • Department of Equality between Women and Men and Equal Opportunities, Action Plan for the State Strategy for Equality between Women and Men and Equal Opportunities 2021–2027.
Slovenia	<ul style="list-style-type: none"> • Research and Development Activity Act, Article 4, (http://pisrs.si/Pis.web/pregledPredpisa?id=ZAKO3387). • Scientific Research and Innovation Activities Act, http://www.pisrs.si/Pis.web/pregledPredpisa?id=ZAKO7733). • The Student Status Act, ZUPŠ-1, May 2022, http://www.pisrs.si/Pis.web/pregledPredpisa?id=ZAKO8435 supplements the Higher Education Act (ZVis, in force since 1994) (http://pisrs.si/Pis.web/pregledPredpisa?id=ZAKO172). • Resolution on the National Program for Equal Opportunities for Women and Men 2021–2030, https://e-uprava.gov.si/drzava-in-druzba/e-demokracija/predlogi-predpisov/predlog-predpisa.html?id=12389. • Resolution on the National Program for Equal Opportunities for Women and Men 2021–2030 - motion for consideration. • Resolution on the Slovenian Scientific Research and Innovation Strategy 2030, http://www.pisrs.si/Pis.web/pregledPredpisa?id=RESO133. • Resolution on National programme of higher education 2030, http://www.pisrs.si/Pis.web/pregledPredpisa?id=RESO139. • Higher Education Act, ZVis, in force since 1994, http://pisrs.si/Pis.web/pregledPredpisa?id=ZAKO172.



Table B

The list of references provided by all national experts in the country cluster Central & East Europe

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Eftimova, Andreana. 2019. "Meanings of Lexis Gender under the Impact of the Media Debate on the Acceptance of the Istanbul Convention". In <i>Nomen Est Omen</i> , edited by Valentina Bondzhalova, Anelia Petkova, and Anelia Vasileva, 261–74. Veliko Tarnovo: St. Cyril and St. Methodius Publishing House.	BG4
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Croatia	
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INSPIRE

**D2.2 4 x Country-cluster reports,
Member States country information
Methodological annex:
expert survey**

**Maria Caprile (Notus)
Dalia Argudo (Notus)
Lorena Pajares (Notus)**

25 September 2023



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Consortium

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

The 4 Country Cluster Reports (CCR) are the outcome of a survey with 27 experts from the four clusters (Northern West, Central West, Southern, Central East, and Eastern) representing the EU Member States. This survey gathered information from each country regarding structural change aimed at promoting inclusive gender equality in R&I organisations.

1.1 Main Concepts

The survey focused on **structural change towards inclusive gender equality in R&I organisations** in the country. Structural change is defined here as a long-term, sustainable process, aimed at building an institutional environment (values, norms, structures and procedures) in which inclusive gender equality is widely discussed and explicitly embraced through organisational and individuals' practices that have a demonstrable impact on reducing gender and other axes of inequality and discrimination within the organisation.

The survey addressed **five topics** of interest related to structural change:

- **Initiating change:** How organisations can be encouraged to adopt a gender equality policy (GEPs and equivalent/alternative measures) based on local knowledge, experience and change movements as well as evidence-based tools (e.g., gender equality audit).
- **Sustaining and deepening change:** How organisations can address resistances and sustain and deepen change by building institutional gender competence, dedicating resources and structures, promoting evidence-based measures, and broadening the scope of intervention (e.g., integrating sex/gender analysis in curricula or research content; implementing a sexual harassment protocol).
- Adopting an **intersectional approach:** How organisations can move from GEPs and/or EDI interventions to inclusive intersectional GEPs fostering change towards equality.
- Implementing **gendered innovations:** How innovation clusters and private R&I companies can be encouraged to implement gendered innovations - that is to innovate by integrating methods of sex and gender analysis into their R&I products or services, ideally taking into account also other axes of inequality and discrimination.
- **Monitoring inclusive gender equality:** How organisations can support an evidence-based inclusive gender equality by implementing effective monitoring conceptual approaches, tools, and indicators - in particular in the four topics identified above (initiating change; sustaining and deepening change; adopting an intersectional approach; implementing gendered innovations).

1.2 Implementing Process

1.2.1 Selection of Experts

The information-gathering process began with the careful selection of experts from each country, with each Country Cluster Coordinator (CCC) responsible for their respective selection. Individuals with extensive experience and knowledge of structural change in the five



key domains were contacted. Selection criteria included work experience, publication of relevant research, and participation in similar projects. Some consortium partners' team members acted as national experts for their countries: SDU (Denmark), JR (Austria), Fraunhofer (Germany), UH (Belgium), RU (Netherlands), Notus (Spain), JU (Poland), and ZRC SAZU (Slovenia).

1.2.2 Development of the Questionnaire

The questionnaire was designed by Notus in cooperation with consortium members (FUOC, JR, SDU, SRU, Fraunhofer, UZ, ZRC SAZU and GESIS) to comprehensively address key aspects of structural change in the five topic areas. In a later stage, it was tested by external experts to ensure pertinence and clarity. The questionnaire includes both open and closed questions to obtain a complete perspective on the experts' experience and knowledge. Additionally, the questionnaire provides key concepts and guidelines for its completion. In total, it consists of 47 questions distributed across 7 sections (see questionnaire at the end).

1.2.3 Meeting with Experts

A meeting was scheduled on March 10th, 2023, with experts and CCCs to introduce the study's purpose and explain the participation process. During this meeting, experts were given the opportunity to request additional information or seek clarifications about the survey.

1.2.4 Collection of Information

Throughout the information-gathering process, SDU, JR, Notus, and ZRC SAZU members provided coordination and support to the experts. Expert responses were automatically collected using the LimeSurvey platform from March to the end of April 2023.

1.2.5 Validation of Results

The draft results were reviewed by the CCCs, specifically to assess clarity. If needed, experts were given a two-week period to address these requests.

1.2.6 Data Analysis

Once all the information was collected from the experts, CCC proceeded with data analysis. This involved processing responses, identifying patterns and trends, and synthesizing key findings.

1.2.7 Meeting with Country Cluster Coordinators

A meeting was scheduled with the CCCs to discuss the cluster report template as well as the next steps.

1.2.8 Presentation of Preliminary Results

Each CCC presented a summary of the preliminary results of the expert survey at the INSPIRE Project Meeting in Ljubljana on 10 June 2023.



1.2.9 Generation of Reports

The results of the analysis were used to generate the four country cluster reports, which include main findings, conclusions, and recommendations.

The process of gathering information from experts ensured a rigorous collection and analysis of qualitative data, allowing to obtain valuable knowledge and insights on structural change in the EU27 countries. The resulting reports will serve as a foundation for decision-making and strategy formulation to support the INSPIRE research program on structural change toward inclusive gender equity in R&I, as well as for public use.



2 Questionnaire: Expert survey

This is an expert consultation launched by INSPIRE. This Horizon Europe project aims to build a sustainable centre of excellence on inclusive gender equality in research and innovation (R&I). The expert consultation will provide crucial support to the INSPIRE research programme on structural change towards inclusive gender equality in R&I, through:

- collecting information and analysis on policy developments and research debates at the national level; and
- identifying engaged stakeholders, other potential experts and relevant resources in the country, as well as collecting suggestions to support existing or potential initiatives for developing new communities of practices (CoPs).

The consultation involves one expert in each EU27 Member State. There are 47 questions in this survey.

Introduction and guidance

Please read this introduction carefully as it provides the definitions of all important concepts used throughout this questionnaire.

Scope and objective: This is an expert consultation launched by INSPIRE. This Horizon Europe project aims to build a sustainable centre of excellence on inclusive gender equality in research and innovation (R&I). The expert consultation will provide crucial support to the INSPIRE research programme on structural change towards inclusive gender equality in R&I, through:

- collecting information and analysing policy developments and research debates at the national level (or any subnational level depending on where the policy competence lies); and
- identifying engaged stakeholders, other potential experts and relevant resources in the country, as well as collecting suggestions to support existing or potential initiatives for developing new communities of practices (CoPs).

The consultation involves one expert in each EU27 Member State.

Background: In 2021, gender equality in higher education, research and innovation has been reaffirmed as a priority for the new European Research Area (ERA). By end of June 2022, Member States have indicated their interest in addressing ERA Action 5 (Gender equality and inclusiveness)^[1]. So far, gender equality plans (GEPs) have been the European Commission's means to address this challenge in R&I organisations.

Despite twenty years of concerted efforts in research and policy to advance gender equality in R&I, inequalities persist, and change is slow at best^[2]. Research into the evidence of gender equality interventions is relatively scarce. However, existing work points to the importance of 1) legal and policy frameworks governing gender equality in R&I; 2) gender equality movements and organisational change agents; 3) power dynamics / resistances against gender equality measures that hinder effective, long-term change^[3]. Moreover, there are substantial differences in the implementation of gender equality policies in R&I organisations across different regions and sectors, and in the effects of these policies on inequalities along different social categories. In other words, the advances concerning gender equality in R&I have not been sufficiently sustainable nor inclusive.

The following issues have been identified in the ERA^[4]:

- Enduring gender inequalities in European R&I systems holding back the ERA's potential.



- Persisting low level of integration of sex/gender analysis into R&I content (including basic research, applied research, and innovation) which undermines R&I quality and societal impact.
- Persisting knowledge and skills problems: ongoing unconscious gender bias among staff and decision-makers.
- Significant heterogeneity continues across Europe with regard the implementation of gender equality policies in R&I organisations, including GEPs.
- Inclusiveness issues remain under-addressed - this is evident with regard the lack of an intersectional approach that takes into account gender and other grounds of inequality and discrimination; lack of sensitiveness towards the historical context of EU countries and the importance of local gender expertise; and lack of specific policies and measures to foster the involvement of the private R&I organisations, namely with regard the integration of sex/gender analysis into applied research and innovation products and services;
- Lack of indicators that can enable monitoring the evolution of the R&I landscape and its intersectional dimension as well as progress in terms of careers, institutional competitiveness, mobility, and R&I quality.
- Lack of research on intersectionality in organisations' policies and practices, which results in a drag on advancing gender equality, hinders the spread and advance of research quality, and fails to take advantage of local potential for innovations (unknown lost opportunities).

Based on this background, INSPIRE will advance knowledge and provide targeted support where progress towards (inclusive) gender equality has been slow or insufficient. The approach of INSPIRE rests on **three dimensions of inclusion– intersectional, geographic, sectorial** - which delineate the areas in need of special attention in order to advance towards a more equitable ERA:

- Intersectional inclusiveness. INSPIRE builds on the growing consensus across disciplines that an intersectional approach is crucial both to analyse and address inequality in individual and institutional opportunities. An intersectional approach is necessary to capture the complexity of the emergence and reproduction of inequalities in real-life situations, in which sex, gender, class, ethnicity, age, sexual orientation and health (among others) play a simultaneous and interrelated role.
- Geographic inclusiveness. INSPIRE adopts a comprehensive approach to building equality policies that are sensitive to the different geographic/historical contexts of different EU countries. There is no universal policy recipe for achieving greater equality in R&I across Europe. INSPIRE strives to mobilize existing gender expertise in all countries and to deploy it within locally situated knowledge production to foster structural change towards gender equality.
- Sectorial inclusiveness. The need to rethink past and current approaches to gender equality is also evident in relation to disparities across R&I sectors - in particular, the lack of policies supporting private companies to integrate sex/gender analysis in the development of their R&I products and services in private companies. INSPIRE aims to foster sectorial inclusiveness by promoting gendered innovations in the private R&I sector.

Main focus of the consultation: The consultation focuses on structural change towards inclusive gender equality in R&I organisations in the country.

The consultation addresses **all types of R&I organisations:**

- Research funding organisations (e.g. research Ministries and public bodies funding basic and applied research; innovation agencies; other public and private institutions funding research and/or innovation)
- Research performing organisations:
 - Higher education institutions (public and private)
 - Other public research performing organisations (publicly funded research institutes)
 - R&I companies (e.g., private companies providing R&I products or services)
 - NGOs and other non-profit research performing organisations (e.g., private R&I foundations)



Structural change towards inclusive gender equality refers to a long-term, sustainable process aimed at building an institutional environment (values, norms, structures and procedures) in which inclusive gender equality is widely discussed and explicitly embraced in organisational and individuals' practices having a demonstrable impact on reducing gender and other axes of inequality and discrimination^[5].

A **Gender Equality Plan (GEP)** is an **instrument** to institutionalise a gender equality policy and implement a structural change process. In this questionnaire, a GEP is defined according to the eligibility criterion and minimum requirements established by the European Commission to participate in Horizon Europe (see box). Organisations may adopt similar/equivalent instruments to implement structural change or alternative instruments. These **alternative instruments** may focus only on gender or be interventions that fall under the umbrella of Equality, Diversity, Inclusion (EDI) policies, or just diversity policies.

Box - Horizon Europe GEP eligibility criterion

To be eligible, legal entities from Member States and Associated Countries that are public bodies, research organisations or higher education establishments (including private research organisations and higher education establishments) must have a gender equality plan, covering the following minimum process-related requirements:

- publication: a formal document published on the institution's website and signed by the top management;
- dedicated resources: commitment of resources and expertise in gender equality to implement the plan;
- data collection and monitoring: sex and/or gender disaggregated data on personnel (and students, for the establishments concerned) and annual reporting based on indicators;
- training: awareness-raising/training on gender equality and unconscious gender biases for staff and decision-makers.

Content-wise, it is recommended that the gender equality plan addresses the following areas, using concrete measures and targets:

- work-life balance and organisational culture;
- gender balance in leadership and decision-making;
- gender equality in recruitment and career progression;
- integration of the gender dimension into research and teaching content;
- measures against gender-based violence, including sexual harassment.

Source: European Commission (2021). Horizon Europe Guidance on Gender Equality Plans (GEPs)

Questions about structural change focus on **five topics** of interest:

- **Initiating change:** How organisations can be encouraged to adopt a gender equality policy (GEPs and equivalent/alternative measures) based on local knowledge, experience and change movements as well as evidence-based tools (e.g., gender equality audit).
- **Sustaining and deepening change:** How organisations can address resistances and sustain and deepen change by building institutional gender competence, dedicating resources and structures, promoting evidence-based measures and broadening the scope of intervention (e.g., integrating sex/gender analysis in curricula or research content; implementing a sexual harassment protocol).
- **Adopting an intersectional approach:** How organisations can move from GEPs and EDI interventions to inclusive intersectional GEPs fostering change towards equality.



- **Implementing gendered innovations:** How innovation clusters and private R&I companies can be encouraged to implement gendered innovations - that is to innovate by integrating methods of sex and gender analysis into their R&I products or services, ideally taking into account also other axes of inequality and discrimination.
- **Monitoring inclusive gender equality:** How organisations can support an evidence-based inclusive gender equality by implementing effective monitoring conceptual approaches, tools and indicators - in particular in the four topics identified above (initiating change; sustaining and deepening change; adopting an intersectional approach; implementing gendered innovations).

We kindly request you to provide as comprehensive answers as possible. In particular, we would like you to pay attention to the five topics and all types of R&I organisations in your replies. Thank you!

Timeframe: Please send your reply by 30.04.2023 at the latest. - early replies will be more than welcome!

Footnotes

[1] Communication from the Commission A new ERA for Research and Innovation (COM/2020/628 final); Council Conclusions on the New European Research Area of 1 December 2020 (13567/20); Council Conclusions on the future governance of the European Research Area (14308/21); The Ljubljana Declaration on Gender Equality in Research and Innovation; EU Pact for Research and Innovation.

[2] European Commission (2020) A Union of Equality: Gender Equality Strategy 2020-2025. Palmén, R. & Kalpazidou Schmidt, E. (2019) Analysing facilitating and hindering factors for implementing gender equality interventions in R&I: Structures and processes. Evaluation and Program Planning 77, 101726.

[3] Palmén, R. & Kalpazidou Schmidt, E. (2019) Analysing facilitating and hindering factors for implementing gender equality interventions in R&I: Structures and processes. Evaluation and Program Planning 77, 101726.

[4] Stareva, M. Gender Equality in Horizon Europe, Bridge2HE with NCPs Training: Introducing Gender Issues and the Gender Equality Plan in Horizon Europe, 11 March 2021.

[5] European Commission (2012). Structural change in research institutions: Enhancing excellence, gender equality and efficiency in research and innovation. Directorate-General for Research and Innovation. <https://www.act-on-gender.eu/survey/index.php/admin/authentication/sa/login>; European Commission (2021). Horizon Europe Guidance on Gender Equality Plans (GEPs) <https://www.act-on-gender.eu/survey/index.php/admin/authentication/sa/login>

1 Please select the country for which you are responding *

Choose one of the following answers

Please choose only of the following:

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus



- Czechia
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Spain
- Sweden

Section 1a - Legal and policy framework

Taking as a reference point the specific information on the legal and policy framework provided by the GEAR tool for your country, please answer the following questions.

Guidelines

- Please consider legal and policy changes affecting organisations in all R&I sectors (e.g., including private companies and private non-profit organisations).
- Please consider legal and policy changes related to the five topics of interest:
 - **Initiating change.** For instance, legislation or measures that make it compulsory for (some) R&I organisations to adopt GEPs or equivalents/alternative measures.
 - **Sustaining and deepening change.** For instance, legislation or measures to encourage a broader scope of GEPs (e.g., gender in curricula and research content in HEIs; protocols for sexual harassment, etc); or supporting evidence-based measures (e.g., external evaluation of GEPs)
 - **Adopting an intersectional approach.** For instance, legislation or measures fostering that R&I organisations extend GEPs to address other axes of inequality and discrimination; measures fostering that R&I organisations take fully into account gender in their EDI interventions.
 - **Implementing gendered innovations.** For instance, policies or measures fostering companies to take into account gender and other axes of inequality and discrimination in their R&I products or services; policies or measures fostering collaboration of companies in this field.
 - **Monitoring inclusive gender equality.** For instance, measures that make it compulsory for (some) R&I organisations to collect and make public some monitoring data; legislation that facilitates or makes the collection of (intersectional) data more difficult for organisations.
- Please include the full reference and link to any legal or political change.



2 The information provided by the GEAR tool was collected until August/September 2021. Since then, has there been any **legal changes** in the field of gender equality in R&I in your country? *

Please choose **only one** of the following:

- Yes
- No

3 Please describe the **legal changes** in the field of gender equality in R&I in your country (up to 500 words). *

Only answer this question if the following conditions are met: Answer was 'Yes' at question ' 2 ' (The information provided by the GEAR tool was collected until August/September 2021. Since then, has there been any legal changes in the field of gender equality in R&I in your country?)

Please write your answer here:

4 The information provided by the GEAR tool was collected until August/September 2021. Since then, has there been any **changes in the policy framework** in the field of gender equality in R&I in your country? *

Please choose only one of the following:

- Yes
- No

5 Please describe briefly these changes (up to 500 words). *

Only answer this question if the following conditions are met:

Answer was 'Yes' at question ' [G01Q0102]' (The information provided by the GEAR tool was collected until August/September 2021. Since then, has there been any changes in the policy framework in the field of gender equality in R&I in your country?)

Please write your answer here:



6 Are there any R&I policies in place in your country that explicitly build on an **intersectional approach** to foster equality? *

Please choose only one of the following:

- Yes
- No

7 Please describe briefly these policies (up to 400 words). *

Only answer this question if the following conditions are met:

Answer was 'Yes' at question ' [G01Q0103]' (Are there any R&I policies in place in your country that explicitly build on an intersectional approach to foster equality?)

Please write your answer here:

8 Are there any R&I policies in place in your country that foster private companies and/or other R&I organisations to take into account **gender in their R&I products or services?** *

Please choose only one of the following:

- Yes
- No

9 Please describe briefly these policies (up to 400 words). *

Only answer this question if the following conditions are met:

Answer was 'Yes' at question ' [G01Q0104]' (Are there any R&I policies in place in your country that foster private companies and/or other R&I organisations to take into account gender in their R&I products or services?)

Please write your answer here:



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Section 1b - Legal and policy framework

10 Taking as a reference point the 2022 country reports non-discrimination please answer the following question:

What are the legally enshrined protected characteristics from which **discrimination is prohibited**?

*Please write your answer here:

--	--

Please provide a summary of the main legal enactments in your country (up to 200 words).

11 How would you assess the current legal and policy framework in your country? In your opinion, is it *adequate* to foster or sustain significant advances in the field of inclusive gender equality in R&I organisations in your country? *

Please choose the appropriate response for each item:

	Yes, it is highly adequate	Yes, it is adequate	No, it is insufficient	No, it is highly insufficient	I cannot give a definite answer
Initiating change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustaining and deepening change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Adopting an intersectional approach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implementing gendered innovations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monitoring inclusive gender equality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate your answer for each topic:

Section 2 - Literature on structural change

Please identify the most relevant literature about structural change towards (inclusive) gender equality in R&I organisations in your country and reply to the following questions.

12 Please select the most relevant literature about structural change towards (inclusive) gender equality in R&I organisations in your country; at least 5 publications - out of which at least 3 in local language. *

Please write your answer here:

You may include academic literature as well as other types of publications (organisation's reports, policy analysis, working papers, etc.). Please give priority to the most recent publications (published in last 5 years).

For each publication, please provide:

- Bibliographical reference (Use Chicago Manual of Style)
- English summary and/or abstract of selected publication in local language (use of automatic translation is accepted).

If you cannot identify at least 5 relevant publications, out of which at least 3 in local language, please indicate this explicitly.



13 How would you assess the current knowledge base on structural change towards (inclusive) gender equality in R&I organisations in your country? In your opinion, is it **adequate** to support significant, evidence-based advances in the field of inclusive gender equality in R&I organisations in your country? *

Please choose the appropriate response for each item:

	Yes, it is highly adequate	Yes, it is adequate	No, it is insufficient	No, it is highly insufficient	I cannot give a definite answer
Initiating change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustaining and deepening change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adopting an intersectional approach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implementing gendered innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monitoring inclusive gender equality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate your answer for each topic:



14 What is the **degree of uptake of GEPs** in your country by type of R&I organisation? *

Please choose the appropriate response for each item:

	Most or many have GEPs	Some have GEPs	A few or none have GEPs	I do not know. To my knowledge, there is no reliable information about GEP uptake
Research funding organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher education institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other public research performing organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private companies working on R&I	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NGOs and other non-profit research performing organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

For each type of R&I organisation, please tick one option in the grid below. Please refer only to GEPs as defined in this questionnaire (Horizon Europe eligibility criterion).



15 What type of R&I organisations in your country do you consider to be relative “newcomers” with regard of implementing a GEP? *

Please choose the appropriate response for each item:

	Yes	No	I cannot give a definite answer
Research funding organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher education institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other public research performing organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private companies working on R&I	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NGOs and other non-profit research performing organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

For each type of R&I organisation, please indicate if you consider they are relative "newcomers" in the grid below.



16 For each R&I organisation that you consider to be relative "newcomers", please explain why in the grid below *

Research funding organisations	
Higher education institutions	
Other public research performing organisations	
Private companies working on R&I	
NGOs and other non-profit research performing organisations	

17 Are there **alternative instruments to GEPs** in your country? If so, what are these? What type of R&I organisations adopt these? *

Please choose the appropriate response for each item:

	I do not know. To my knowledge, there is no reliable information about this	Alternative instruments are not widespread	Alternative instruments are widespread
Research funding organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher education institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Other public research performing organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private companies working on R&I	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NGOs and other non-profit research performing organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

To answer this question, please consider that alternative instruments may focus only on gender or be interventions that fall under the umbrella of Equality, Diversity, Inclusion policies, or just diversity policies.

For each type of R&I organisation, please fill in the grid below, indicating whether alternative instruments are widespread.

18 Please, indicate the main type of existing alternative instruments. *

Only answer this question for the items you selected in question G02Q05 ('Are there alternative instruments to GEPs in your country? If so, what are these? What type of R&I organisations adopt these?')

Only answer this question for the items you did not select in question G02Q05 ('Are there alternative instruments to GEPs in your country? If so, what are these? What type of R&I organisations adopt these?')

	Main type of widespread alternative instruments (up to 100 words)
Research funding organisations	
Higher education institutions	
Other public research performing organisations	
Private companies working on R&I	
NGOs and other non-profit research performing	



organisations	
---------------	--

19 What are the main **barriers and facilitators** for **initiating change** towards gender equality in R&I organisations in your country? *

	Main barriers (up to 100 words)	Main facilitators (up to 100 words)
Research funding organisations		
Higher education institutions		
Other public research performing organisations		
Private companies working on R&I		
NGOs and other non-profit research performing organisations		

Barriers and facilitators can be:

- **External/contextual** (e.g., (un)supportive legal and policy framework; weak/strong gender equality movements; or
- **Internal/organisational** (e.g., top management (lack of) official commitment; absence/presence of experts on gender equality and structural change within the organisation; available/not available gender audit)

Please elaborate considering each type of R&I organisations.

If you think that barriers or facilitators are the same for two or more types of R&I organisations, please elaborate your answer for the first type of R&I organisation and state "as [type]" for the other(s).



20 What are the main **barriers and facilitators for sustaining change** towards gender equality in R&I organisations? *

	Main barriers (up to 100 words)	Main facilitators (up to 100 words)
Research funding organisations		
Higher education institutions		
Other public research performing organisations		
Private companies working on R&I		
NGOs and other non-profit research performing organisations		

Barriers and facilitators can be

- **external/contextual** (e.g. (un)supportive legal and policy framework; weak/strong gender equality movements; or
- **internal/organisational** (e.g. resistances from/commitment and gender competence within top management; (lack of) adequate resources; (lack of) regular monitoring and external evaluations)

Please elaborate considering each type of R&I organisations.

If you think that barriers or facilitators are the same for two or more types of R&I organisations, please elaborate your answer for the first type of R&I organisation and state "as [type]" for the other(s).



21 What are the main **barriers and facilitators for adopting an intersectional approach?** *

	Main barriers (up to 100 words)	Main facilitators (up to 100 words)
Research funding organisations		
Higher education institutions		
Other public research performing organisations		
Private companies working on R&I		
NGOs and other non-profit research performing organisations		

Barriers and facilitators can be:

- **external/contextual** (e.g. legal and policy framework; weak/strong intersectional gender equality movements; or
- **internal/organisational** (e.g. (lack of) experts of gender equality and intersectionality within the organisation; (lack of) diversity policies; organisational difficulties / specific measures to integrate gender and other equality policies

Please elaborate considering each type of R&I organisations.

If you think that barriers or facilitators are the same for two or more types of R&I organisations, please elaborate your answer for the first type of R&I organisation and state "as [type]" for the other(s).



22 Who are the **main stakeholders for and against structural change** towards inclusive gender equality in R&I organisations in your country? *

	Main stakeholders for structural change (up to 100 words)	Main stakeholders against structural change (up to 100 words)
Research funding organisations		
Higher education institutions		
Other public research performing organisations		
Private companies working on R&I		
NGOs and other non-profit research performing organisations		

Stakeholders can be

- **external/ contextual** (e.g. policy makers; political parties, social movements, gender equality research institutes...)
- **internal/ organisational** (top management, senior researchers, mid managers, gender researchers, gender practitioners, research staff, administrative staff, students...)

Please elaborate considering each type of R&I organisations:

If you think that stakeholders for and against structural change are the same for two or more types of R&I organisations, please elaborate your answer for the first type of R&I organisation and state "as [type]" for the other(s).



23 How **socio-cultural, political and economic contexts** impact institutionalisation of gender equality in R&I in your country? (Up to 400 words)

*Please write your answer here:

Please answer this question using the publications indicated in question 12. For each statement, please cite the source used. If there are no relevant publications for answer this question, please state this.

24 What are the **practical lessons** to be learnt from interventions or policies producing significant changes in R&I organisations for (inclusive) gender equality in your country? Could you provide some examples of good practice/results from specific interventions and identify who and how did changes occur in specific R&I organisations? (Up to 400 words)

*Please write your answer here:

Please answer this question using the publications indicated in question 12. For each statement, please cite the source used. If there are no relevant publications for answering this question, please state this explicitly.



25 In particular, do you consider there has been any relevant **advance regarding gendered innovations** in the R&I private companies in your country? (Up to 300 words) *

Please write your answer here:

Please elaborate your answer considering that advances may stem from the role played by research funding organisations, specific innovation policies, pioneering role played by some companies in a given sector etc.

Please answer this question using the publications indicated in question 12. For each statement, please cite the source used. If there are no relevant publications for answering this question, please state this explicitly.

26 In particular, do you consider there has been any relevant **advance concerning data collection and monitoring change** in R&I

organisations for inclusive gender equality in your country? (Up to 300 words) *

Please write your answer here:

Please elaborate your answer considering that advances may stem from new legislation that facilitates the collection of (intersectional) data, large scale (national) initiatives, expert groups, pioneering role played by some R&I organisations, etc.



Please answer this question using the publications indicated in question 12. For each statement, please cite the source used. If there are no relevant publications for answering this question, please state this explicitly.

Section 3 - R&I organisations

Please provide specific information on R&I organisations in your country.

27 Please provide the overall number of **Higher Education Institutions** in your country. *

Your answer must be at least 0

Only an integer value may be entered in this field.

Please write your answer here:

28 Please indicate the source and/or provide additional comments to the overall number of Higher Education Institutions in your country. *

Please write your answer here:

29 Please provide the overall number of public **Research Performing Organisations** in your country. *

Your answer must be at least 0

Only an integer value may be entered in this field.

Please write your answer here:



30 Please indicate the source and/or provide additional comments to the overall number of Research Performing Organisations in your country. *

Please write your answer here:

31 Please provide an estimate of the number of **companies in the R&I private sector** in your country. *

Your answer must be at least 0

Only an integer value may be entered in this field.

Please write your answer here:

32 Please indicate the source and/or provide additional comments to the overall number of companies in the R&I private sector in your country. *

Please write your answer here:



33 Please indicate the name of 2-5 companies in the R&I private sector in your country.																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;"></th> <th style="width: 40%;">Name</th> <th style="width: 35%;">Comments</th> </tr> </thead> <tbody> <tr> <td>Company 1</td> <td></td> <td></td> </tr> <tr> <td>Company 2</td> <td></td> <td></td> </tr> <tr> <td>Company 3</td> <td></td> <td></td> </tr> <tr> <td>Company 4</td> <td></td> <td></td> </tr> <tr> <td>Company 5</td> <td></td> <td></td> </tr> </tbody> </table>		Name	Comments	Company 1			Company 2			Company 3			Company 4			Company 5		
	Name	Comments																
Company 1																		
Company 2																		
Company 3																		
Company 4																		
Company 5																		
<p>The total number of selected companies depends on your country:</p> <ul style="list-style-type: none"> respondents for France, Germany, Italy indicate 5 companies respondents for Austria, Belgium, Netherlands, Poland, Spain, Sweden indicate 4 companies respondents for Bulgaria, Czechia, Denmark, Finland, Greece, Hungary, Ireland, Portugal, Romania, Slovenia indicate 3 companies respondents for Croatia, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta, Slovakia indicate 2 companies <p>The selected companies should be representative in terms of size (turnover, rather large companies), type of organisation, economic activity, and geographical location within your country. If known, please select companies that receive EU research funding.</p>																		

Section 4 - Engaged stakeholders

Please indicate the most relevant stakeholders engaged in any of the five topics in your country.

When identifying individuals please make sure all included information is already in the public domain. This is important for data protection issues.



34 Please name up to 3 relevant **policy makers** in your country engaged in promoting structural change towards (inclusive) gender equality in R&I organisations in your country.

	Name of policy maker	Institution	Position / role	Email	Comments
Policy maker 1					
Policy maker 2					
Policy maker 3					

When selecting policy makers, please consider:

- Whether any of the most important R&I policy makers in your country is engaged in any topic.
- Other policy makers that play a relevant role in your country in any of these topics.
- Policy makers can be from any administration level (national; federal/regional; local).
- The same policy maker can be engaged in different topics.
- If possible, select a set of policy makers that cover all topics - or as many as possible.

35 For each of the indicated **policy maker**, please mark in which topics they are engaged.

	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Policy maker 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy maker 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy maker 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



36 Please name up to 3 **Research Funding Organisations** (RFOs) engaged in promoting structural change towards (inclusive) gender equality in R&I organisations in your country.

	Name of RFO	Type of funding (basic, applied, both)	Name of contact person	Email	Comments
Research Funding Organisation 1					
Research Funding Organisation 2					
Research Funding Organisation 3					

Please take into account that a RFO can be engaged in a topic pursuing two main different aims:

- implement structural change within their own organisation
- foster structural change in other research organisations

For instance, considering the topic 'initiating change' - a RFO can:

- Adopt its first GEP and implement measures to promote gender equality in staff recruitment and promotion (initiating structural change within the organisation)
- Establish GEP as an eligibility criterion for access funding (encouraging other research organisations to initiate structural change)

It is relevant to consider the potential role of RFOs to foster gendered innovations in the R&I private sector - for instance a RFO can:

- Establish that research proposals have to make explicit the relevance of the gender dimension to be considered for funding
- Include gender-related criteria to assess the quality and impact of research proposals

When selecting RFOs, please consider:

- Whether any of the most important public RFOs in your country is engaged in any topic.
- Other RFOs (either public or private) that play a relevant role in your country in any of the topics.
- The same RFO can be engaged in different topics
- If possible, select a set of RFOs that cover all topics - or as many as possible.



37 For each of the indicated **Research Funding Organisations**, please mark in which topics they are engaged.

	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Research Funding Organisation 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research Funding Organisation 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research Funding Organisation 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

38 Please name up to 3 **Research Performing Organisations** (RPOs) in your country, playing a prominent role in structural change towards (inclusive) gender equality in R&I in your country.

	Name of RPO	Type (HEI, public RPO, R&I company)	Name of contact person	Email	Comments
Research Funding Organisation 1					
Research Funding Organisation 2					
Research Funding Organisation 3					

- Within RPOs please consider: **Higher Education institutions** (HEIs); **other public research performing organisations** (public RPOs); **private R&I companies**.
- Please try to select at least one organisation in each of these categories.
- The same organisation can play a prominent role in more than one topic.



- The meaning of 'playing prominent role' may vary across topics and country specific aspects. For instance:
 - a public RPO may play a prominent role in **'initiating change'** because it has been the first organisation of this type adopting a GEP in the country - it is a pioneering organisation boosting change in other public RPOs.
 - a HEI or a public RPO may play a prominent role in **'sustaining and deepening change'** because it has successfully implemented measures to strengthen the gender dimension in curricula or research content - which is a novelty in the country.
 - a HEI may play a prominent role in **'adopting an intersectional approach'** because its GEP includes an in-depth audit to analyse the current situation of the university in terms of gender and other axes of inequality - in order to identify specific equality challenges.
 - a private company may play a prominent role in **'implementing gendered innovations'** because it is an international leader in this field in a given sector - e.g. Artificial Intelligence, health services,
 - a public RPO may play a prominent role in **'monitoring inclusive gender equality'** because it implements regular surveys to collect comprehensive data on research staff and analyse changes, advances and challenges in research careers from an intersectional approach.
- If you cannot identify at least one organisation in a given topic, please explain why in comments.
- If you wish to provide additional information about any organisation, please include it in comments.

39 For each of the indicated **Research Performing Organisations**, please mark in which topics they are engaged.

	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Research Funding Organisation 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research Funding Organisation 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research Funding Organisation 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



40 Please name up to 3 engaged **associations, networks or Communities of Practice (CoPs)** engaged in promoting structural change towards (inclusive) gender equality in R&I organisations in your country.

	Name	Type (association, network, CoP)	Name of contact person	Email	Comments
Association, Network, CoP 1					
Association, Network, CoP 2					
Association, Network, CoP 3					

- An **association** is any group of individuals or organisations that form a legal entity to pursue common interests. For instance: an association of universities; a women/gender-equality association; a students' association, etc.
- A **network** is conceived in its broadest sense - any group of interconnected individuals or organisations who share information, exchange views, etc. For instance, a group of gender practitioners virtually connected to share information; a group of private companies that use to organise innovation symposia from time to time, etc.
- A **Community of Practice (CoP)** has a more specific definition within INSPIRE. It is a group of representatives from R&I organisations with shared interest in advancing (inclusive) gender equality in R&I.
- When selecting associations/networks/CoPs please consider:
 - The same association/network/CoP can be engaged in more than one topic.
 - Select the association/network/CoP that are more influential in any topic.
 - If possible, select a set of association/network/CoP that cover all topics - or as many as possible.
- If you cannot identify at least one association/network/CoP in a given topic, please explain why in comments.
- If you wish to provide additional information about selected association/network/CoP, please include it in comments.



41 For each of the indicated **associations, networks or CoPs**, please mark in which topics they are engaged.

	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
Association, network, CoP 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Association, network, CoP 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Association, network, CoP 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

It may be that a relevant association, network or CoP does not fit neatly in any of the five topics. If this is the case, please indicate the topics you think it is most closely related. For instance: a network working on "early research careers", could be related to 3 topics: "initiating change", "sustaining and deepening change" and "adopting an intersectionality approach".



42 For each topic, please indicate at least one **specialised consultancy**.

	Name of the consultancy	Name of contact person	Email	Comments
Initiating change				
Sustaining and deepening change				
Adopting an intersectional approach				
Implementing gendered innovations				
Monitoring inclusive gender equality				

When selecting specialised consultancies, please consider:

- Select the consultancy that is most influential in your country in each topic.
- The same consultancy can be engaged in more than one topic.
- Consultancies can be either non-profit or for-profit.

If you cannot identify at least one consultancy in a given topic, please explain why in comments.

If you wish to provide additional information about selected consultancies, please include it in comments.

Section 5 - Further experts and trainers

When identifying experts please make sure all included information is already in the public domain. This is important for data protection issues.

43 Please indicate **other experts** in your country with relevant knowledge / practical expertise in any of the five topics.



	Name of expert	Institution	Position / role	Email	Comments
Initiating change					
Sustaining and deepening change					
Adopting an intersectional approach					
Implementing gendered innovations					
Monitoring inclusive gender equality					

When indicating experts, please consider:

- Experts can be academic researchers and/or practitioners
- Identify experts that are influential in your country in a given topic - influence may be driven by specialised academic knowledge, practical expertise or both
- Take into account experts that have participated in EU funded structural change projects
- The same expert can be influential in more than one topic.
- Please indicate your own specialised knowledge / practical expertise in any of these topics.

If you cannot identify at least one expert in a given topic, please explain why in comments.

If you wish to provide additional information about selected experts, please include it in comments.

44 Please indicate four potential **trainers and/or mentors** from previous/current EU funded structural change projects or other experiences of structural change in your country.



	Name	Institution	Position / role	Email	Comments
Trainer 1					
Trainer 2					
Trainer 3					
Trainer 4					

Section 6 - Training resources

We would like to know training resources (audiovisual, guides, etc) that in your view have been useful for supporting institutional change towards (inclusive) gender equality in R&I organisations in your country. Please indicate:

45 Please indicate one training resource in **English, not included** in the GE Academy training repository or inventory or the GEAR tool.

Please write your answer here:

Please indicate the title of the training resource, together with a link or reference and a short description of the addressed topic / content.

46 Please indicate one training resource in the **national language**.

Please write your answer here:



Please indicate the title of the training resource, together with a link or reference and a short description of the addressed topic / content.

Section 7 - Communities of Practice

47 Please provide suggestions for INSPIRE to support Communities of Practices (CoPs) in any of the five topics.

	Theme	Existing or potential CoP	Comments
Initiating change			
Sustaining and deepening change			
Adopting an intersectional approach			
Implementing gendered innovations			
Monitoring inclusive gender equality			

When indicating suggestions, please consider:

- Themes that are relevant in your country.
- Existing CoPs that may be willing to broaden their scope (thematic; sectorial; geographic..)
- Potential CoPs based on existing initiatives of collaboration among organisations (e.g. associations, networks, structural change projects, etc)
- Potential CoPs based on emerging themes of shared interest (without previous collaboration)

Thank you for submitting your responses!



Submit your survey.

Thank you for completing this survey.

Disclaimer

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