

ADVANCING GENDER EQUALITY IN RESEARCH ORGANISATIONS

KEY FACTORS FOR SUCCESS

Edited by
Jörg Müller and Rachel Palmén



Advancing Gender Equality in Research Organisations

Advancing Gender Equality in Research Organisations: Key Factors for Success examines how organisational gender equality can be effectively designed, implemented, and evaluated in European universities and research institutions.

Drawing on the most comprehensive study to date of gender equality plans across Europe, this edited volume presents 14 case studies from eight countries developed within the INSPIRE Centre of Excellence. The chapters analyse six core facilitating factors for sustainable change: strategic organisational commitment, comprehensive data collection for equalities work, advanced gender expertise, inclusive communities of change agents, enforceable legislation, and supportive social and cultural contexts. This book further advances the field through a comparative, outcome- and impact-oriented framework that addresses both gendered power relations and gendered value hierarchies, offering a critical alternative to symbolic equality measures.

This book is essential reading for scholars of gender and organisational change; researchers and students in higher education studies; and practitioners, consultants, and policymakers engaged in gender equality work in research and innovation.

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Key Factors for Success

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Abbreviations

AGK	Advanced Gender Knowledge
AI	Artificial Intelligence
AHMSSBL	Arts, Humanities, Medicine, Social Sciences, Business and Law
CoP	Community of Practice
CoPs	Communities of Practice
CoPP	Community of Political Practice
CS1, CS2, … CS14	Case Study 1, Case Study 2, … Case Study 14
GBV	Gender-Based Violence
GEAM	Gender Equality Audit and Monitoring
GEP	Gender Equality Plan
GEPs	Gender Equality Plans
EBM	Evidence-Based Medicine
EBPM	Evidence-Based Policymaking
EC	European Commission
ERA	European Research Area
EU	European Union
EDI	Equality, Diversity, and Inclusion
FTE	Full-Time Equivalent
HEA	Higher Education Authority
HEI	Higher Education Institution
HEIs	Higher Education Institutions
HR	Human Resources
KSH	Knowledge and Support Hub
LGBTQIA+	Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, A-Sexual, and Additional Identities
LGBT+	Lesbian, Gay, Bisexual, Transgender, and Additional Identities
NPM	New Public Management
QCA	Qualitative Comparative Analysis
PhD	Doctor of Philosophy
RFO	Research Funding Organisation

RFOs	Research Funding Organisations
RPO	Research Performing Organisation
RPOs	Research Performing Organisations
STEM	Science, Technology, Engineering, and Mathematics
TMT	Top Management Teams
ToC	Theory-of-Change
VR	Vice-Rector

1 Introduction—how effective are gender equality plans for organisational transformation?

Rachel Palmén and Jörg Müller

Introduction

Although Gender Equality Plans (GEPs) are among the main instruments at the European Union (EU) policy level for fostering a more inclusive European Research Area (ERA) and are widely adopted across national contexts, their actual impact remains poorly understood. In part, this has to do with the fact that GEPs are challenging to define as a research object. GEPs differ widely in format, scope, purpose, and level of integration and are strongly shaped by national laws, organisational cultures, and broader gender norms. Second, GEPs sit at the crossroads of several fields (gender studies, public policy, organisational sociology, and higher education studies), but none treat them as a core object of study. Their themes span diverse issues with different logics, making them difficult to analyse within a single coherent framework. Third, research on GEPs largely emerges from practitioner-oriented, often EU-funded projects, which emphasise application over theory-building. GEPs are perceived as administrative, low-status instruments, reducing scholarly attention and limiting long-term, theory-driven comparative research.

In this context, where research on GEPs has largely emerged as a by-product of practitioner-driven, European Commission (EC)–funded structural change projects, the chance to carry out dedicated, comparative research on GEPs in the context of the INSPIRE project (see https://www.inspirequality.eu) is a unique opportunity. For the first time, a dedicated, comparative research effort has been financed by the EC to examine in more detail under which circumstances GEPs achieve substantial transformations. Overall, 45 case studies have been carried out in the context of INSPIRE to gain new insights about and beyond GEPs. While researchers and gender scholars have drawn upon the rich experiences of many structural change endeavours, these often have been driven by project implementation logics and remained limited in geographical scope and thematic reach. At the same time, given the wide adoption of GEPs across Europe, the task is overdue to examine in more detail what has been achieved. Research on GEPs at this scale has not been carried out within Europe.

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INSPIRE's remit as the European Centre of Excellence on Inclusive Gender Equality in Research and Innovation includes an ambitious empirical five-point research programme targeting different aspects of GEPs across Europe, including (1) the development of GEP monitoring indicators, (2) GEP prevalence survey and web crawl, and (3) 35 case studies on GEP impact. Furthermore, INSPIRE has carried out research beyond GEPs in terms of (4) ten case studies on intersectional policies in higher education institutions (HEIs) as well as (5) four case studies to foster inclusive gendered innovations. Through this research, INSPIRE aims to create new knowledge regarding the present and future of GEPs in Europe as an effective instrument for greater gender equality and inclusion.

INSPIRE's research programme is complemented by a well-developed, practitioner-oriented support programme, operationalised through Knowledge and Support Hubs (KSHs). Four KSHs form part of INSPIRE: (1) sustaining and deepening change in the R&I ecosystem, (2) widening participation and reach of GEPs, (3) integrating an intersectional approach to equality, and (4) promoting gender-sensitive innovation communities and policies in the private sector. Each KSH supports up to three communities of practice (CoP) that participate in research but also provide feedback on received support and participate in co-creation activities to convert research insights into practical and effective tools for structural change. Overall, INSPIRE has supported 12 CoPs with over 90 organisations from more than 34 countries spanning Europe, Latin America, and Northern Africa.

This book is concerned with the 14 GEP impact case studies across Europe. As described in more detail in Chapter 2, research on the facilitating and hindering factors to achieve GEP impact was divided into a first wave of 14 in-depth case studies and a second wave of 21 light-weight cases (Müller 2023). This allowed for a combination of in-depth analysis based on a rich and diverse empirical base of cases across different national and institutional contexts to better understand what works, when and how to achieve GEP outcomes and impact.

EU policy framework

At the EU level, the EC has repeatedly confirmed its commitment to pushing forward with gender equality in research and innovation. While gender equality is a cross-cutting ambition and priority to be embedded throughout all policy areas, and binding directives are applied across the labour market as a whole, including the research sector, the EC recognises the specific challenges that the research and innovation sector presents. There are three main ways that the Commission tackles structural inequalities in research and innovation:

- ERA in collaboration with Member States.
- Framework Programmes for Research and Innovation (including Horizon 2020 and Horizon Europe).
- She Figures—data gathering and analysis over time.

Since 2012 and the publication of the ERA communication, which set out gender equality and gender mainstreaming in research as a key priority, organisations have been invited to enact institutional change through GEPs (European Commission 2012). This approach has targeted three main substantive areas: (1) promoting gender equality in careers, (2) ensuring gender balance in decision-making, and (3) integrating the gender dimension in R&I content and programmes. This focus on three main priority areas has provided a useful framework to operationalise actions at the organisational level. Institutional change through GEPs has subsequently been reinforced through further policy documents (see the 2015 Council Conclusions), while dedicated funding has been provided to over 350 research-performing and research-funding organisations with an overall budget of over EU 79 million.[1]

The 2020 ERA communication emphasises inclusive gender equality in R&I as the goal. Inclusiveness in this instance is used as a broad umbrella term to refer to tackling a range of inequalities with differing scope(s). It refers to geographical inclusiveness across Europe and sectoral inclusiveness, i.e., going beyond the public sector to embrace the private sector as well as taking an intersectional approach to gender, that is, recognising how axes of privilege and disadvantage intersect (ethnicity, disability, and sexual orientation), producing unequal outcomes for individuals.

The ERA policy agenda 2025–2027 identified key priorities and structural aims, including 'strengthening gender equality and inclusiveness in the ERA, notably with an intersectional approach.' Implementation will be fostered through six concrete actions, including, "Devise a monitoring and evaluation approach for the effective implementation of (inclusive) GEPs." It is this action that the evidence from this book speaks to. This book is based on the most extensive empirical data collection in research organisations throughout Europe—aiming to chart those necessary conditions to effect real change.

Regarding the framework programmes, within Horizon Europe, there are three main ways in which gender equality is addressed: the eligibility criteria, integrating the gender dimension into research and innovation, as well as gender balance. From 2022, GEPs for public bodies, research organisations and higher education establishments form part of the 'eligibility criteria' to participate in the framework. GEPs should include content relating to the following thematic areas: 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, and measures against gender-based violence, including sexual harassment. The GEP must also cover the following process-related requirements: publication—a formal document, signed by top management and posted on the organisation's website; dedicated resources: necessary resources and gender expertise for implementation of the plan; periodic sex and/or gender disaggregated data collection (staff and students); and awareness raising/training on gender equality and unconscious biases for staff

and decision-makers (European Commission 2021a). The Horizon Europe Research programme also includes the default requirement to integrate the gender dimension in R&I content across the whole programme. Gender balance among research teams is also promoted with a target of 50% on boards and committees whilst is considered a tiebreaker for equally ranked proposals (European Commission 2021b:18). Specific funding is allocated to gender and intersectional research throughout the programme—while measures and activities for promoting gender equality under the European Innovation Council (EIC) have been developed.

Gender equality plans and organisational transformation: building on past lessons to move forward

As the policy review of the previous section has shown, GEPs have been the preferred mechanism to enact structural change in favour of gender equality in research-performing organisations including universities throughout Europe. While this policy development has been largely welcomed by gender equality scholars and practitioners, little is known about the effectiveness of GEPs to mitigate gender biases in organisational practices. As many organisations across Europe have implemented their second and third editions of GEPs, institutionalisation of equality infrastructures in itself is not a sign of success anymore. Given the lack of real transformation in many cases, some argue that these institutionalised practices are 'window-dressing' or 'gender-washing' exercises without effecting real substantive change (Dobbin and Kalev 2017; O'Connor 2025). Although envisioned as a key mechanism for dismantling gender inequalities in higher education and research, in practice GEPs risk devolving into little more than a box-ticking paper document—ineffective at best and, at worst, inadvertently disadvantaging the very women they aim to support (Tzanakou 2019). This has spurred interest in a deeper understanding of the key facilitating factors that convert GEPs into effective tools for change.

Research on the effectiveness of GEPs has been largely practitioner-driven, emerging primarily as a by-product of successive rounds of structural change projects funded by the EC. This has resulted in a diverse body of literature, comprising individual articles, reports, and books, that document in depth the experiences of organisations involved in these change processes, typically spanning around six to eight research institutions (Clavero and Galligan 2021; Wroblewski and Palmén 2022). Ferguson (2021) summarised the central insights regarding the structural change approach in Europe, based upon seven EC-funded projects, including TARGET, INTEGER, GenderTIME, FESTA, GENOVATE, SAGE, and EQUAL-IST. On the one hand, the report draws upon the initial guidance provided by the Gender Equality in Academia and Research (GEAR) tool (European Institute for Gender Equality 2016), highlighting and refining the hindering and facilitating factors for organisational change already identified by the EC's report on *Structural*

Change in Research Institutions (European Commission 2011). On the other hand, the report emphasises that to promote sustainability of change, organisations need to focus on "process over outcomes" which increases "the effectiveness of gender equality plans and ensures sustainability of structural change over the longer term" (Ferguson 2021:39). However, given that progress remains slow or stagnates despite a reflexive approach to change, the relation between 'process' and 'outcomes' might be more complex than initially assumed. As we will develop throughout the chapters of this book, the existing evidence base, regarding GEP impact factors is rather 'thin' in terms of not being addressed by targeted, comparative empirical research. To a large degree, our current knowledge of GEP outcomes and impact is a fruit of insights derived from evaluation reports of the design, implementation, and outcomes of the GEPs (Espinosa, Bustelo, and Velasco 2016). While rich in empirical detail and helpful for equality practitioners, these reports seldom link back to discipline-specific theories and conceptual approaches regarding organisational change. Hence, what is needed is a more systematic and consistent articulation of the organisational facilitating factors together with a clear understanding of how GEP design and implementation processes are linked to outcomes and impact.

The most developed model on GEPs as a tool for structural change is the *Impact Driver Model* developed by Mergaert, Cacace, and Linková (2022). The model is based upon the insights of structural change projects such as SUPERA, GEARING-roles, Gender-SMART, and LIBRA and assesses the institutional change processes towards gender equality, driven by 12 "impact drivers". The model's focus is clearly on 'institutionalisation' as a five-stage implementation process that runs from building initial resources and support (often tied to EC project funding) to internal capacity building and integration towards final integration and institutionalisation of gender equality. The institutional model is complemented with an "Actor Mobilisation Model" which moves from activating single change agents towards an institution-wide community for structural change and "shared social action" (Mergaert et al. 2022:6). Integrating the institutionalisation process with the actor mobilisation, 12 "impact drivers" for change are then identified:

1 A core team of change agents.
2 Capacity and skills of the change agents for driving institutional change for gender equality.
3 Leadership actively committed to gender equality and gender mainstreaming.
4 Availability of resources.
5 Data collection and statistical analysis.
6 Involvement of internal stakeholders.
7 Involvement of external stakeholders and experts.
8 Coverage of the different dimensions/areas of gender equality institutional change.
9 Transparency and accountability.

10 Institutional policy-making based on a robust understanding of gender equality.
11 Organisational culture.
12 Organisational governance.

The impact drivers mirror similar research, for example, the hindering and facilitating factors for change identified by the EFFORTI case studies (Palmén and Kalpazidou Schmidt 2019) or those identified in the context of the ADVANCE programme in the United States (DeAro, Bird, and Mitchell Ryan 2019; Laursen and Austin 2020). Although these different studies place slightly varying emphasis on identified facilitating factors (Rosser et al. 2019), they are in agreement with regard to the overall importance of institutionalisation as the ultimate goal of structural change efforts. However, the emphasis on institutionalisation that serves as both the main instrument for change and 'success' indicator has three shortcomings which hinder further advancement in the field: it lacks a solid theory of change for each factor, it is largely oblivious to power and status dynamics, and it fails to define indicators of 'success' that capture impact as transformation of gendered power and status hierarchies.

First, a focus on institutionalisation through 'impact drivers' lacks a solid theory of change regarding each factor. So far, the list of impact drivers has been derived largely from evaluation reports of organisations participating in EC-funded projects. As such, they are the result of observing similar features across participating organisations that are seldom developed in more detail to explain their precise contribution to change. Drawing on our own research, Chapter 3 on Strategic Organisational Commitment, for example, argues that despite top management commitment being widely acknowledged as a crucial 'impact driver' for change, there is no shared understanding of who forms part of top management, what top management commitment entails in practice, and how it contributes (or impedes) successful equality change. Similarly, Chapter 4 highlights the importance of data and how monitoring for equality goals is widely hailed as important, yet a coherent account of how data management and usage contribute to (or impedes) organisational change is missing. As each of the chapters dedicated to the GEP impact factors developed during our research will show, a more systematic and conceptual account of how these factors contribute to change is still missing. Within the 'impact driver' framework, existing facilitating factors are largely examined in relation to a five-stage model of institutionalisation without clearly analysing how each factor contributes to change.

Second, existing models of institutionalisation through 'impact drivers' lack a more explicit and differentiated account of how gendered power and status hierarchies affect change. Although from a (neo)institutional, feminist perspective, power is conceived in terms of how gendered formal political and informal rules shape behaviour and the distribution of resources and privilege (Kenny 2007; Krook and Mackay 2010), these are seldom part of

an explicit analysis of change. The top-down orientation often prioritises an apolitical technocratic process over outcomes and neglects the influence of context, legislation, and power and status dynamics. Conceiving of power as institutionalisation, however, underestimates the reality of "secondary institutionalization" (Larreche and Ulloa 2018) or "institutionalization in dispute" (Ruiz Bravo and Pizzaro 2022). As the accounts by Larreche or Ruiz Bravo indicate, secondary institutionalisation occurs when gender equality interventions have been institutionalised but remain ineffective precisely because they fail to affect existing gendered power and status hierarchies within organisations (Dobbin and Kalev 2017). Some of these concerns are addressed through 'resistance' to change that draws upon a more explicit account of power (Tildesley, Lombardo, and Verge 2022). However, inattention to organisational power structures remains an important limiting factor (Maria, Angeli, and Eleftherakis 2023) as it also does not adequately differentiate power from gendered status hierarchies within organisations. As we will argue throughout this book, progress towards gender equality needs to tackle both power and status hierarchies of cultural value associated with gender much more explicitly.

Third, current models of institutional change and impact drivers remain largely inattentive to envisioned outcomes and impact, particularly from a comparative perspective. While the literature on gender inequalities in science analyses incessantly the underlying mechanisms that reproduce inequalities and catalogue policy interventions to address them (Belingheri et al. 2021; Phillips, Jun, and Shakeri 2022), far less attention is devoted to assessing the actual solutions, including outcomes and impacts of these interventions (Lau et al. 2023). Yet without such a solution-centred analysis, it is difficult to evaluate "the extent to which gender policies have succeeded in eliminating gender and sexual hierarchies to create a more gender-just society" (Engeli and Mazur 2018:120). Crucially, neglecting outcomes and impacts also limits our understanding of what works, for whom, and under which conditions. In the absence of systematic comparative work that targets outcomes and impact, i.e., that operates without a clear understanding of envisioned transformation, we are unable to explain cross-case variation or to deepen our understanding of the complex mechanisms underpinning organisational (Mazur and Spierings 2016).

As we argue based upon the empirical work carried out across 14 GEP impact case studies, substantive change focused on real transformation combines three elements: it needs to change organisational practices that shift simultaneously the gendered *power* as well as the *status* hierarchies of cultural value attached to gender. While organisational processes and procedures are captured by institutionalisation processes, which can be truly 'transformative' or merely 'ceremonial,' an outcome and impact-oriented approach that is anchored in transforming power and status hierarchies provides a more comprehensive framework for implementing and assessing change.

The case study research presented throughout this book has identified six facilitating factors for organisational transformation towards more gender equality organisations. These factors are as follows:

1 Strategic Organisational Commitment
2 Comprehensive Data for Equalities Decision-Making
3 Advanced Gender Knowledge
4 Inclusive Communities of Change
5 Enforceable Legislation
6 Supportive Context

The factors have been derived by taking the existing literature as a starting point and revising its central insights in light of our in-depth case studies across Europe. Contrasting our findings with the extant literature on structural transformation as well as other disciplines results in an empirically grounded yet conceptually consistent theory of change. Each factor is conceptualised not in terms of different levels of institutionalisation but in terms of different levels that contribute to a transformation of power and status-based hierarchies.

We take an interdisciplinary approach, finding inspiration in a range of disciplines, from organisational and management studies, political science, sociology, and evaluation studies, amongst others—with each discipline providing a small piece of the complex puzzle. For example, organisational and management studies provide insights into decision-making processes and organisational culture yet can fail to link this to the broader social and political context. We also build on the work developed in political science, where adoption of formal policies is examined, but the complex implementation of these policies and subsequent outcomes remains under-researched. Taking the more traditional political science approach with the focus on formal adoption of policies, we can see how insights from social movement theory, which emanates predominantly from sociology, can be eclipsed, overshadowing one of the main 'bottom-up' explanatory mechanisms of the change process. The design, implementation, and evaluation of GEPs is an inherently 'real'-world challenge, spanning, and muddying neat disciplinary divisions and conceptual demarcations.

Central gender equality concepts used throughout this book

Gender Equality. Although gender equality is a contested and travelling notion, with multiple meanings and subject to change, it relates to political struggles and social justice. In management and organisational studies, gender equality refers to equal opportunities, equal outcomes, the advancement and promotion of women, and the emancipation or empowerment of women (Lombardo and Verloo 2009). Hence, gender equality means equal visibility, power, and participation of women and men and gender non-conforming

or non-binary people (Benschop and Verloo 2006). In the ERA, gender equality relates to three core areas: gender equality in scientific careers (presence), gender balance in decision-making (voice), and integration of gender dimension into the content of research and innovation (process) (Chaves and Benschop 2023; Palmén and Müller 2022).

Gender Equality Plan. In a broader sense, a GEP refers to a planned change approach to achieve gender equality in a specific organisation or institution. It could be a set of actions aimed at identifying gender inequalities and bias, designing and implementing measures to correct these, and setting targets and monitoring progress via indicators (European Institute for Gender Equality 2016). According to EU-Horizon Europe, GEPs target visible and invisible inequalities in five core areas of intervention:

– 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

Starting in 2022, the EC introduced GEPs as a new eligibility criterion for research organisations and higher education establishments to get access to funding from the Horizon Europe Framework Programme (2021–2027). GEPs are a tool for institutionalising change and could help to achieve structural change. Hence, part of our research is to analyse the results of GEPs and their challenges towards sustaining change (Chaves and Benschop 2023).

Inclusion. INSPIRE understands "inclusion" primarily as a participatory, transformatory process guided by non-negotiable core values such as feminism, care, social and epistemic justice, fairness, equality, solidarity, decolonialism, and democratic participation. An inclusive, participatory process is not an end in itself; it serves a purpose of change: it targets the systemic nature of social injustice. Core values guide the process and prevent it from being hijacked by anti-democratic, authoritarian agendas. "Inclusion" captures the quality of the interpersonal relations involved: to what degree do individuals feel valued in their uniqueness while being part of critical organisational processes such as access to information and resources, involvement in work groups and/or ability to influence decision-making processes. Geographic inclusion as conceived by INSPIRE consists of a comprehensive approach to build inclusive gender equality policies considering specificities of social and political contexts and building on past experiences and practices, including those situated outside Western and Eurocentric genealogies of knowledge (Palmén and INSPIRE Consortium 2023).

Intersectionality is a theory, methodology, and analytic tool that exposes the interlocking systems of oppression and privilege, power relations and social inequalities that occur on multiple axes, including, but not limited to, gender, ethnicity, and race; social and economic status; sexual orientation;

disability; and age. It focuses on the interlocking nature of inequalities at an individual, interpersonal, and structural level and how they mutually reinforce itself (Beeckmans, Zanoni, and Van Laer n.d.; Crenshaw 1989; Holvino 2010).

Inclusive Gender Equality from an Intersectional Perspective. In order to ensure the effectiveness of GEPs in their aim to facilitate organisational change for greater equality, GEPs should be based on an inclusive participatory process while integrating an intersectional perspective. Inclusive GEPs should be developed and implemented through participatory processes involving diverse organisational stakeholders. It is crucial to engage decision-makers, implementers, and key target groups (staff and students), particularly underrepresented minority groups, in the planning and implementation phases. Inclusive GEPs should apply an intersectional framework throughout data gathering and the design of objectives and actions, as well as implementation (monitoring) and evaluation, to tackle the interlocking systems of oppression and privilege, power relations, and social inequalities that occur on multiple axes, including, but not limited, to gender, ethnicity, and race; social and economic status; sexual orientation; disability; and age.

Overview of chapters

The main body of this book (Chapters 3–8) is organised around the six facilitating factors of the INSPIRE Change Model, followed by Chapter 9, which outlines a comparative framework for assessing the outcomes and impact of gender-equality interventions. These chapters are complemented by two methodology-focused contributions: Chapter 2, which details the research methods and collaborative processes used to conduct 14 GEP impact case studies across Europe, and Chapter 10, which describes the co-creation process through which the INSPIRE Change Model was translated into a practical diagnostic tool for organisational change.

Chapters 3–8 thereby offer the opportunity to revisit our empirical evidence assembled across the 14 GEP impact case studies in light of the existing research and academic literature. This results in an empirically anchored yet conceptually coherent account for explaining change for greater gender equality. As such, each chapter should be read as the state-of-the-art account of how each facilitating factor contributes to change. The six factors that comprise our model are not isolated elements but form part of a coherent, interlocking theory of change that, by working together increases the chances of real transformation.

Chapter 2 addresses the methodological challenges to conducting comparative research on GEPs across Europe and how these have been addressed while implementing the 14 GEP impact case studies for this book. GEPs are difficult to study comparatively because they are highly heterogeneous, deeply shaped by institutional and national contexts, and often intertwined with other organisational policies. Despite their central role in EU efforts to

promote a more gender-equal ERA, GEPs rarely become the primary focus of comparative research due to both methodological and conceptual challenges, including the difficulty of defining GEPs as a distinct unit of analysis. This chapter demonstrates how context-dependency and complexity of GEPs were addressed collaboratively by a distributed research effort across six Consortium partners. It carefully argues for the methodological, practical, and analytical compromises adopted to carry out comparative research on gender equality across Europe.

Chapter 3 targets the first facilitating factor of the INSPIRE Change Model, namely Strategic Organisational Commitment. The chapter starts with the recognition of the importance of top-management commitment to advancing gender equality initiatives, which is seldom scrutinised for its empirical basis or its conceptual coherence. Senior leaders such as rectors, deans, and directors provide crucial legitimacy, resources, and strategic direction, yet how this commitment translates into concrete organisational change remains less understood. Chapter 3 reframes top-management commitment as a wider Strategic Organisational Commitment to gender equality. In contrast to emphasising personal involvement of senior leaders, Strategic Organisational Commitment involves the incorporation of equality goals into strategic documents of the organisation, dedicated internal resources, voice and vote of equality staff at the highest decision-making level as well as dedicated governance and accountability structures for gender equality. As a result, expertise, resources, and communication capacities are fully integrated into a sustainable, institution-wide effort.

Chapter 4 analyses the importance of comprehensive data collection and analysis for gender equality. Data is essential for identifying inequalities, prioritising interventions, and monitoring and evaluating progress. Without data, the (in-)effectiveness of actions cannot be assessed. Although this central role of data collection for equality goals and organisational change is widely recognised, dedicated research is scarce and under-valued. This chapter provides an overview of the diverse data collection strategies found across our 14 GEP impact case studies, including different infrastructures put in place and resources dedicated. Approaches differ considerably, ranging from the isolated, ad hoc compilation of administrative data towards systematic and frequent collection of experience-based, qualitative and quantitative data. Ultimately, data only drives change when used reflexively as part of a clear theory of change, guiding decision-making and steering equality efforts across all organisational levels. How inequalities data is managed, collected, and analysed, and what it is used for—impacts on the quality and ultimately the success of the organisational change process.

Chapter 5 centres on the role of knowledge in producing sustainable change for inclusive gender equality in academia. It delves into the different types of knowledge valuable for structural change and reflects on which institutional conditions and practices are needed for it to be impactful. Building on feminist and decolonial scholarship, this chapter introduces and elaborates

the concept of Advanced Gender Knowledge, examining how knowledge production, epistemic authority, and institutional contexts shape the transformative potential of GEPs and other equality, diversity, and inclusion interventions. Moreover, using Advanced Gender Knowledge, the chapter critically explores whose knowledge counts in institutional change processes and how feminist, intersectional, and decolonial forms of knowledge can be mobilised for structural transformation.

Chapter 6 explores how equality work can move beyond fragmented, individually driven interventions toward collective, value-based arrangements capable of addressing power relations and organisational cultures. Using an inductive and iterative qualitative approach, the chapter analyses how different actor configurations consisting of equality officers, equality committees, feminist and gender scholars, privileged leaders, and grassroots collectives interact to shape equality work in higher education and research organisations across Europe. The findings show that sustainable change emerges when formal governance structures are combined with bottom-up collective action and the active involvement of actors in privileged positions. The combination of actors and processes constitutes Inclusive Communities of Change that connects senior leadership, middle management, and grassroots actors, facilitating coordination, participation, and continuity. The chapter identifies key conditions for effective Inclusive Communities of Change—including organisational reach, coordination between centralised and decentralised actors, meaningful inclusion, and sustainability grounded in formal recognition and care-based practices—and offers a theoretically informed framework for moving from individual change agents to collective, organisation-wide approaches to gender-equality transformation.

Chapter 7 underscores the importance of Enforceable Legislation for equality change. Although many countries have anti-discrimination laws, legislation and/or public policies addressing gender inequality in research and higher education (for example, to make GEPs mandatory), these are not necessarily effective. Previous mapping efforts across Europe have shown that governmental policy and/or legislative approaches to gender equality vary significantly between countries in scope and implementation, ranging from inactive to proactive policy profiles. As this chapter argues, legislation and public policy only become effective instruments for meaningful change when backed up by three elements: (1) policy and legislation are supported by adequate resources for implementation, (2) robust compliance mechanisms are grounded in clear quality standards, and finally (3) credible sanctions ensure that obligations are taken seriously and translated into practice.

Chapter 8 examines the final facilitating factor of the INSPIRE Change Model—Supportive Context—highlighting how the effectiveness, design, and implementation of GEPs are profoundly shaped by the cultural, political, and social environments in which institutions operate. Rather than treating a GEP as a standalone policy document, this chapter conceptualises it as part of broader processes of societal and organisational change that unfold across

higher education systems and academic institutions. By situating GEPs within wider policy agendas, we examine how they intersect with competing priorities, debates, and reform initiatives, becoming flexible instruments that can either reinforce or challenge ongoing dynamics. The chapter analyses how contextual constraints and opportunities shape the trajectories of institutional change, proposing a multidimensional understanding of context across cultural, political, and social dimensions, each with temporal and spatial variation. Drawing on concrete examples, Chapter 8 demonstrates how context conditions structural change efforts and presents a set of indicators designed to support more context-sensitive and adaptive equality interventions.

Chapter 9 examines the challenges of conducting comparative research on GEP outcomes and impact. Despite significant progress achieved through European-level structural gender-equality projects, our understanding of what works in which contexts remains limited, largely due to the lack of systematic, impact-focused comparison. The chapter argues that robust comparative assessment requires a framework grounded in the two core dimensions of gender inequality, economic and power-based inequalities on the one hand, and gender-based status hierarchies on the other. It further maintains that outcomes and impact must be analysed in relation to specific interventions rather than entire GEPs, while still keeping sight of the overarching goal of dismantling gendered power and status hierarchies. Building on insights from Chapter 2, the chapter shows that only by isolating particular intervention areas—such as career advancement or the prevention of gender-based violence—can we meaningfully compare cases, learn from cross-case variation, and uncover the complex mechanisms driving gender-equality change.

Chapter 10 outlines the co-creation process used to translate the INSPIRE Change Model into a practical, diagnostic tool for organisational change. The chapter describes the collaborative process and the development of a diagnostic tool, focusing on participants' feedback regarding the relevance, clarity, and completeness of the indicators derived from the empirical research. Through the co-creation workshops, the chapter provides feedback on whether the developed GEP impact indicators are pertinent and associated with real changes towards greater gender equality in organisations. Indicators were classified according to the degree of consensus (from very important to least important) and problematic indicators and why? As well as identifying missing indicators. The extent to which the indicators reflect the power to change organisations for greater gender equality was discussed, as was the extent to which the indicators reflect embedding equality practices within the organisation.

Note

1 https://research-and-innovation.ec.europa.eu/strategy/strategy-research-and-innovation/democracy-and-rights/gender-equality-research-and-innovation_en.

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2 Doing comparative research on gender equality plans across Europe

Methodological challenges and insights

Carolina Wienand, Maria Karaulova, and Jörg Müller

Introduction

Gender equality plans (GEPs) are seldom the focus of comparative research because they are highly heterogeneous, strongly shaped by their institutional contexts, and difficult to disentangle from other organisational policies. Although GEPs are strongly promoted by the European Commission (EC) to create a more inclusive and gender-equal European Research Area (ERA), they are not often studied within a systematic comparative research framework. This is due to both methodological and substantive challenges, including the difficulty of defining GEPs as a distinct object of study. This chapter illustrates how some of these challenges were addressed and overcome through the implementation of 35 case studies on GEP impact across Europe, involving a multi-disciplinary and multi-national team of researchers. As such, it might serve as methodological inspiration but also as guidance for other areas of comparative research, where the unit of analysis is hard to pin down, context is crucial, and complexity needs to be accounted for.

The methodological and substantive challenges of comparative research on GEPs are manifold. First, GEPs vary widely in format, scope, and purpose, making it difficult to define what counts as a GEP in a comparative sense. Although the EC has put forward a minimal definition by establishing five thematic areas and four process-related features, these do not necessarily capture the variety of GEPs currently implemented across Europe. GEPs differ not only conceptually (e.g., gender equality vs. diversity) but also in reach (e.g., applied centrally vs. decentrally) and planning stage (e.g., design, implementation, and evaluation) or iterations (e.g., first or second version); some are standalone policy documents, while others are embedded in broader equality, diversity, or strategic plans and coexist with non-discrimination policies, other human resource (HR) policies, or overarching organisational strategic documents. In addition, GEPs are strongly context dependent, as they are shaped by national equality legislation (see Chapter 7) and broader social and cultural gender attitudes (see Chapter 8),

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funding systems, organisational cultures (European Commission 2025), and historical gender regimes. This context dependency makes it hard to define and compare GEPs in a simple and overarching way without oversimplifying or stripping away crucial contextual nuances.

A second reason as to why GEPs make a challenging research object is the fact that they sit at the intersection of multiple scientific fields—gender studies, public policy, organisational sociology, and higher education studies, among others—while no single discipline 'claims' them as its core object of study. Although GEPs have the aim of addressing many different gender inequalities, gender studies' focus is on the latter, that is, on describing and analysing the causes of gender inequalities rather than the policy instruments used to address these. GEPs as policy instruments thus target diverse thematic areas such as career advancement, gender-based violence (GBV), and access to decision-making positions, among others, each following its own logic and envisioned outcomes that do not lend themselves easily to being analysed under a single, integrative 'GEP' framework. Similarly, an organisational scholar's main unit of analysis is the organisation, e.g., a university or research centre, where GEPs are but one—often rather minor—element of management and steering. Hence, GEPs fall between these academic traditions and lack a natural disciplinary home that could contribute to a more precise and shared definition.

Third, therefore, GEPs enter the research agenda mainly through practitioner-oriented literature, much of which is derived from EU-funded projects. This puts the focus on application-oriented research, limiting theory-driven investments and long-term, rigorous comparative research programmes. What's more, GEPs are primarily perceived as administrative instruments that merit little scholarly attention, especially as they target 'low-status' issues such as gender equality compared to other, more 'high-status', and 'high-impact' policy areas such as technological innovation.

Thus, conducting comparative research on GEPs across Europe poses important methodological and substantive challenges that need to be addressed. We hope that by describing the research design and the research process involved in conducting 14 case studies on GEP impact, this chapter provides not only valuable insights into the difficulty to pin down GEPs as a research object but also shows how this can be done by involving six research teams located in five different European countries. As we will argue, a robust comparative framework for GEP impact remains a complex methodological challenge.

Setting the stage: comparative research on GEPs across Europe

In addition to the difficulties in defining GEPs as a clearly delineated research object, our initial research design was furthermore shaped by three initial insights: the existing evidence on organisational 'success' factors, the recognition of complex pathways underlying impact, and the practical requirements

of a cross-European, multi-team research effort. These conditions informed the methodological choices outlined in the following sections.

As described in *D3.6 Methodological Framework* (Müller 2023), a first starting point of our research concerns publications that identify organisational-level 'impact drivers' (EIGE 2016; Mergaert, Cacace, and Linková 2022; Palmén and Kalpazidou Schmidt 2019). Existing reports on the implementation of GEPs in Europe and beyond have highlighted the gap between policy design and implementation, drawing attention to the central organisational hindering and facilitating factors for success. Typical factors include, for example, 'senior-management support', 'data collection', 'involvement of external stakeholders', 'competence development', or 'availability of resources', among others. As our review of this existing research has shown, the conceptualisation and/or theoretical grounding of these facilitating factors is highly diverse. How and why individual factors are distinguished from each other, how they operate, and why they might be effective (or fail) has so far been insufficiently addressed. Nevertheless, this literature provided important entry points that made our research questions and data collection more focused.

A second starting point concerns the strong context-dependent nature of GEPs, which requires methods that can accommodate the complexity of organisational change processes (Kalpazidou Schmidt and Cacace 2017). Existing research on organisational change has identified, for example, national legal requirements and supportive public policies as key drivers of change within institutions (Wroblewski 2020). To the degree that gender equality demands differ not just between countries but also between organisations and even within an organisation (e.g., physics vs. education department), GEP implementation and impact are context dependent: what works in one organisation or department might not necessarily be successful in another. This relational understanding of organisational change—where the contribution and significance of each factor are dependent upon its configuration and combination with other factors—implies a methodological design that can capture contextual nuances across cases while integrating these into a comparative framework to enable generalisations.

A third starting point concerns the need to conduct a distributed research effort by involving six research teams within the INSPIRE consortium. Being an EC-funded research project, the task of implementing research on GEP impact across Europe naturally involved partners conceived in this task as representative of the larger country clusters: Northern Europe (the Netherlands), Southern Europe (Spain), Central Europe (Germany), and Eastern Europe (Poland). Given the aim to conduct 35 case studies, this not only implied a wide range of empirical settings but also a considerable diversity in viewpoints and subjective interpretations of our 'shared' phenomena of interest, namely GEPs, their factors of 'success', and impact.

Taking these three challenges as our methodological starting point led us to the following choices in terms of research design: to conduct case studies

across Europe by integrating a programme evaluation approach and to bind them into a systematic comparative framework through using a Qualitative Comparative Analysis (QCA) method.

Case study research

Case study research is an established research approach in the social sciences that examines in depth a single or a small number of cases with the objective of understanding each case holistically, in its real-world context. As Yin writes, "[…] you would use the case study method because you deliberately wanted to cover contextual conditions—believing that they might be highly pertinent to your phenomenon of study" (Yin 1994:13). As a research approach, case studies are ideally suited to understand how similar GEP interventions can produce quite diverging outcomes and impact, depending on the context in which they are implemented. Organisational change driven by GEP interventions is here conceived as a complex social phenomenon that cannot be reduced to a certain causal, deterministic recipe. Rather, GEP impact is seen as a product of multiple programme-specific, organisational and wider contextual (e.g., national legislation) factors interacting in a non-linear way. Case study research specifically aims to explore such complex social phenomena in their real-life settings. Being a "versatile form of qualitative inquiry, case studies enable a variety of investigations of complex issues, particularly in context, where the boundary between the context and issue is unclear and contains many variables" (Harrison et al. 2017:12). For our purpose, case studies enable us to understand better how gender equality interventions work and how and why impacts vary across contexts.

Programme evaluation

To identify the facilitating and hindering factors influencing GEP impact, our research furthermore adopts a programme evaluation approach (Rogers et al. 2015; Tannenbaum et al. 2019). Programme evaluation provides a framework to address all relevant aspects of how policies are designed, implemented, and ultimately contribute to change; it also combines seamlessly with a case study approach, particularly through the lens of the realist evaluation paradigm (Blamey and Mackenzie 2007; Pawson and Tilley 1997). This is achieved by assessing "what works or does not work, how, for whom, and why" (Kingsley 2020). Existing evaluation frameworks—such as the one developed by the Efforti project—provide a robust structure for data collection by categorising the research process into (a) design, (b) implementation, and (c) outcomes/impact phases. Data collection, thereby, focuses on involved stakeholders, (participatory) processes, common challenges, as well as outcomes and impacts, both intended and unintended. In addition to providing a versatile framework to study policy design and implementation, our

programme evaluation approach was enriched by integrating existing knowledge on the facilitating and hindering factors of GEP impact (see above). This allowed us to make our data collection efforts more focused and directed by pre-identifying key processes and target stakeholders. Interview guidelines were specifically adapted to inquire about the role of identified facilitating elements, such as 'resources', 'governance frameworks', and the role of 'training and capacity building', amongst others. Similarly, our recruitment plan for qualitative interviews targeted the inclusion of previously identified key stakeholders, such as members of the top management team, equality officers, heads of administrative units, or beneficiaries, like students or academic staff. Programme evaluation, thus, provides us with a solid framework to cover all aspects of GEPs as policy instruments, including design, implementation, and their outcomes and impact.

Qualitative Comparative Analysis

QCA was selected as a third element of our research strategy because it allows for an explicit engagement with the inherently context-sensitive and context-dependent nature of gender equality interventions. Initially developed by Charles Ragin (Ragin 2008, 2014), it is a set-based method that formalises how we think about combinations of factors contributing to a given outcome. As organisational change towards greater gender equality is understood as a multifaceted process in which numerous factors interact in non-deterministic ways (Halpern 2014), QCA shows how different combinations of these elements—for example, 'resources' and 'top management commitment' or 'bottom-up engagement' and 'capacity training'—need to be combined to achieve impact. While programme evaluation approaches do capture path-dependent dynamics of change processes, they struggle with cross-case comparison, often leading to the conclusion that "there are no one-size-fits-all recipes" for structural change and empowerment (Gisler et al. 2018). Yet, without systematic comparative analysis, we are unable to account for cross-case variation or to deepen our understanding of the mechanisms that shape gender equality outcomes. QCA speaks to this challenge to discern regularities (what works where, when, and in what order) without reducing the emerging insights into too simplistic recipes for change.

It should be noted that the actual QCA analysis is not part of this book. QCA is introduced nevertheless, at this point, to provide a complete account of our research design, even though not all results can be included in a single book. As described in the introduction, the main emphasis of the collected chapters in this edited volume consists of introducing the six 'sets' or explanatory factors that make up the INSPIRE Change Model. In QCA, each 'set'—and hence each 'chapter' in this book—represents a theoretical concept that contributes to an outcome of interest. By defining 'sets', researchers develop a codified theory of change, that is, formulate an explicit model of how the

selected factors contribute to GEP impact. As such, the definition of 'sets' constitutes a vital step to model GEP impact, as it codifies the best available knowledge to explain (the lack of) change.

Putting it all together: two-wave case study design

Given these initial starting points and methodological choices, we have opted to split the envisioned 35 case studies into two waves of 15 in-depth and 20 lightweight case studies. The aim of the initial 15 case studies was to strengthen and expand the evidence base on institutional change for more inclusive gender equality in academic organisations. In this first phase, the focus lay on understanding the design, implementation, and outcomes of specific GEP interventions in their organisational context. The emphasis was on examining in detail how interventions unfold when equality policies 'hit' organisational realities, diverse stakeholders, and established routines. As a result of the first wave of case studies, the existing typologies of facilitating and hindering factors for GEP impact were thoroughly revised and reconceptualised. Equipped with a consolidated understanding of critical impact factors, the second wave of case studies then aimed to gather further empirical evidence across an expanded set of cases. Whereas the first wave focused on working inductively, paying attention to the minute details of each case, the second wave operated in a more directed, deductive manner, with data gathering following a more standardised design. Correspondingly, whereas a programme evaluation approach aimed for an in-depth understanding of cases in context during the first wave, the second-wave case studies aimed for comparison between cases, using QCA.

Overall, our evidence based on key GEP facilitating and hindering factors was developed by moving from bottom-up, within-case analysis to a top-down, comparative cross-case approach, as illustrated in Figure 2.1. This sequencing of the first and second waves of case studies also explains the

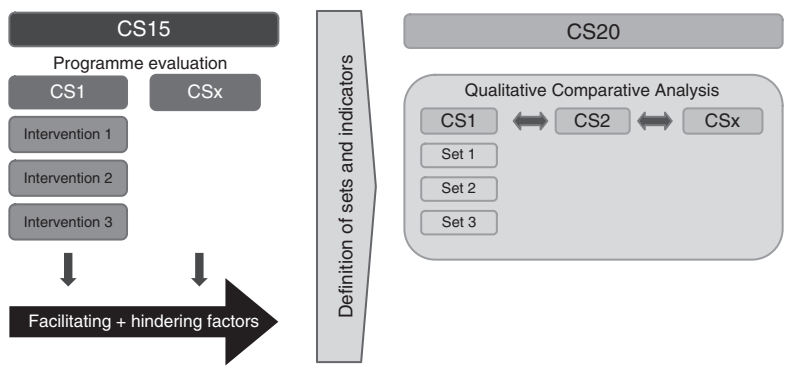


Figure 2.1 Two-wave case study design, combining focused in-depth assessment with comparative analysis.

focus of this book: it draws primarily on the 14 GEP impact case studies from the first wave. Consequently, the full QCA involving all 35 case studies will need to be conducted after the publication of this volume.

Our research in action: choices and challenges

As mentioned, research was carried out in a distributed yet collaborative way between six consortium partners.[1] This implies that each partner was responsible for conducting three case studies during the first wave of case studies within their respective country cluster. The research team at the Universitat Oberta de Catalunya was responsible for the overall coordination, including the development of the overall methodological framework, interview guidelines, and reporting templates. Each research team was responsible for recruiting case study participants, with data ownership residing with the local research team. This implied that interview transcripts, research notes, and other material were not shared between consortium partners, whereas results such as coding schemes and case study reports were shared.

Cases and recruitment process

The central question to be answered at the start of case study research concerns the basic unit of analysis. Although intuitively apparent, neither the organisational level (e.g., university or research centre) nor the GEP provides a sufficiently operative unit of analysis. Instead, emphasising our focus on comparing outcomes and impact, our main unit of analysis is defined by thematic 'equality interventions'. While GEPs include multiple interventions addressing a wide variety of inequalities, we focus on individual thematic interventions as our main unit of analysis, namely those that address recruitment and career advancement on the one hand and those that address the prevention of GBV on the other. The choice of these two specific thematic areas is arbitrary to a certain degree but follows resource constraints, as it allows to concentrate on understanding the impact pathways of selected interventions without the need for a comprehensive evaluation of a complete GEP. Using individual interventions as our main unit of analysis implies naturally to situate their analysis within the context of the GEP and the context of the broader organisation, while not being bound by these.

Although our analytical focus is on GEPs, they are not our primary unit of analysis, as treating them as such would limit our ability to understand their impact. As described, GEPs bundle different equality goals that range from career advancement to the integration of sex- and gender-based analysis to the prevention of GBV. As interventions differ across these thematic areas, so do their outcomes and impact, some being less successful while others achieving more impact. Hence, understanding which factors drive 'success' across cases implies the use of comparable outcome measures to start with,

that is, comparing similar interventions (e.g., career advancement) that aim for similar outcomes (e.g., reduction of gender gap in promotion). Especially since GEPs are often combined with complementary and targeted interventions and policies, their impact cannot be assessed globally but rather needs to be addressed in an intervention-specific way, especially when it comes to comparing its outcomes/impact (see Chapter 9 for details).

Research performing organisations (RPOs) form part of our analysis of GEP impact; however, larger universities often have multiple GEPs, which can complicate a straightforward organisational-level assessment. The Athena SWAN framework in the United Kingdom and Ireland explicitly recognises this fact, as it grants certification to the parent organisation but also to individual faculties and departments within it. While the organisational context is, of course, relevant to understand how individual GEP interventions are designed, implemented, and combined or compete with other policies, it is not the sole unit of analysis.

From a comparative, output- and impact-oriented perspective, it is important to note that our selected interventions, that is, career advancement and prevention of GBV, have distinct logics and 'success' indicators. Career development measures are widely implemented to tackle structural inequality in HR processes and to improve gender balance in leadership and decision-making. The main 'success' indicators concern quantitative metrics, for example, in terms of balanced recruitment and promotion, but also qualitative indicators, such as a welcoming departmental climate. The prevention of GBV, on the other hand, requires attention to power dynamics within institutions: to what degree incidents of GBV are reported and how these are subsequently handled. Assessing outcomes and 'successful' impact is inherently more difficult in this thematic area, defying the simple use of metrics and even qualitative indicators (see Chapter 9). In both cases, it is critical that shifting the focus towards comparing outcomes and impact of equality interventions requires concentrated work in a thematically specific way and rigorous questioning of assessing the GEP as a whole.

Nevertheless, our recruitment efforts targeted RPOs, following a predetermined sampling frame to cover diverse national, regional, and institutional contexts; varying institutional experiences with equality action plans; and variation in measurable GEP effects:

1 Geographical diversity across the ERA to cover the five large country clusters within Europe: Northern, Southern, Central, and Eastern European, as well as Ireland/United Kingdom (see Table 2.1 for an overview of recruited cases per country cluster).
2 Closely related to the geographical spread is feasibility and access in terms of local language coverage and capability within the research team.
3 Type of organisations: public RPOs, possibly larger universities with strongly decentralised administrative units as well as smaller organisations

Table 2.1 Overview of cases per country cluster and wave

Country cluster	*First wave*	*Second wave*	*Total*
United Kingdom/Ireland	2	1	3
Northern Europe	3	4	7
Central Europe	3	7	10
Eastern Europe	3	4	7
Southern Europe	3	5	8
Total	14	21	35

where administrative or gender equality units are centralised and responsible for the entire organisation.

4 Type of GEP: a GEP with at least one-lifecycle (approx. four years) completed in order to assess its potential impact. In addition, GEP cases should be sufficiently varied in terms of their 'success' to understand both the facilitating factors as well as those factors that hinder GEP impact. In addition, the GEP needs to be compliant with the EU requirements: (1) it must be a public document, (2) adequate resources must be allocated for gender equality work, (3) data collection must take place, and (4) the plan must include career development training or similar initiatives, including initiatives of our two focal areas: career development and GBV.

We managed to recruit a total of 14 organisations for the first wave of case studies, one less than envisioned. Starting with the home countries of partner organisations, we extended the scope of the recruitment to other countries in the regional and language clusters, which enabled data collection in the native language and culture-sensitive analysis. Identifying initial contacts was usually straightforward, since most organisations present equality, diversity, and inclusion (EDI) structures, strategies, and activities clearly on their websites. Equality officers tended to respond quickly and showed a strong commitment to the aims of the study. Nevertheless, recruitment, as expected, consumed considerable time and effort and involved, in many cases, a prolonged negotiation, where our contact persons, in turn, had to secure agreement from management and other internal stakeholders.

At the same time, participation placed demands on busy staff. Some institutions declined because relevant interview partners were unavailable or because the expected effort exceeded their capacity at the time. In one case, our negotiations in the end were not successful, explaining one missing case during the first wave of case studies, which was compensated by conducting one additional study during the second wave.

A further challenge was the recruitment bias of organisations where staff considered their GEPs a 'success'. Successful examples are more likely to be highlighted publicly and to volunteer for external studies. Cases marked by resistance or slow progress can be more cautious about participation or

more uncertain about the value of their experience for comparative learning. However, case studies with slow progress and significant resistance are particularly valuable in comparative analysis to learn about hindering factors. Overall, we are grateful to all organisations that agreed to take part and share their learning journey.

On-site visits

One on-site visit was organised in almost every case study, offering the advantage of accessing printed documents and conducting multiple interviews in a short time. On-site visits usually lasted 1–2 days at the organisation, conducting several interviews with key staff over the days. Informal conversations around interviews and focus groups helped us gauge how strategies were enacted in daily practice. Direct observation of the built environment and of small but telling features, such as the presence of gender-neutral restrooms, offered tangible signals of inclusivity and responsiveness.

Document analysis

We began each case study with a systematic review of each institution's website, focusing on publicly accessible documents and the online presentation of gender equality- and diversity-related activities. Key sources included previous and current GEP versions, along with other relevant materials such as strategic plans, evaluation or data-monitoring reports, websites, and other published materials if available. Organisational charts were examined to identify leadership roles and decision-making bodies and to understand the size of the organisation and main organisational changes. Public policy documents such as regional or national strategies related to gender equality or EDI were also collected and integrated into a description of the broader policy context of each case. Usually, the document collection was aided by the EDI officer at the organisation, who provided access to internal documents, aided their interpretation, and suggested additional interview partners from the institution. These documents were imported into qualitative data analysis software and analysed together with interview transcripts and research notes.

Interviews

The core of the empirical work consisted of approximately 15 semi-structured interviews per case with a purposefully selected mix of stakeholders. The interviewees were selected to reflect the key roles and perspectives within each organisation. A first interview typically involved the EDI officer, who put us in contact with additional interviewees across pre-defined categories. Additional interviews usually involved complementary EDI staff and heads of administrative units as well as members of top management teams, beneficiaries of gender equality interventions (e.g., students, research support staff,

and laboratory workers), academic staff, gender experts, and/or technicians and other administrative staff. Besides the suggestions from the EDI officers, interviewees were identified from organisational websites and available public documents (e.g., student groups, news about events and activism on campus), as well as following a snowballing approach.

The interviews were conducted based on semi-structured interview guides. Three versions were developed, specifically adapted to top management, equality staff, and academic staff. The interviews had the aim to (1) establish factual evidence about interventions (scope, implementation, and observable effects) and (2) capture experience-based accounts of studying and working in the organisation, benefiting from equality measures, and everyday interactions with gender equality policies. The linguistic formulation and the choice of words were determined by the interviewer, who adapted them to the interviewee's function and level of expertise (Braunecker 2023). For example, the term 'GEP' was only mentioned in the interviews with informed participants; otherwise, specific interventions were discussed instead. Where possible, interviews were conducted in local languages to foster trust, depth, and authenticity, which are highly beneficial for this kind of qualitative research. The interviews prioritise extended responses from participants, which often include definitions, descriptions of routines, evaluations, and personal opinions. This type of interview is particularly suitable when the research topic concerns the everyday handling of a phenomenon (Schiek 2024). The central question here is how gender equality is experienced in daily practice from the perspectives of different target groups, including those designing and implementing equality measures and those benefiting from them.

In addition, in three case studies, focus groups were organised with several participants from the same stakeholder group, mainly students. The focus groups served as a source to contrast research findings on facilitating and hindering factors and helped to gather information on the outcomes and impacts of certain interventions for a certain group (Müller 2023). Table 2.2 provides an overview of the number of interviews per staff category and focus groups conducted in each case study. Overall, we conducted a total of 135 interviews across the 14 case studies, lasting on average 45–60 minutes each.

All interviews and focus groups were audio-recorded and subsequently transcribed with the help of artificial intelligence (AI) tools to support detailed analysis. Transcripts were manually revised and sent to interviewees for approval. The transcripts were anonymised to protect the identity of interviewees and their institutions by removing any information traceable to the institution. This ensured ethical compliance and made the data suitable for cross-case comparison.

Data analysis

The analysis aimed to test previously identified facilitating factors and identify additional ones. A combination of inductive and deductive coding

Table 2.2 Overview of interviews and focus groups conducted for each case study

	Interviews					*Focus groups*
Case	*Management*	*EDI officers*	*Administrative staff*	*Academic staff*	*Students*	
1	1	2	3	3	1	
2	1	3	4	4	0	
3	2	1	2	4	0	
4	2	2	2	1	0	2
5	1	1	0	1	0	4
6	2	3	1	4	0	
7	2	1	3	4	1	
8	2	5	0	2	4	
9	1	3	0	3	0	
10	2	2	2	1	3	
11	1	2	0	3	0	1
12	2	2	0	2	2	
13	4	5	1	6	3	
14	1	4	1	2	2	
Total	24	36	19	40	16	

approaches was implemented. Full interview transcripts were not shared with the wider case study team due to confidentiality restrictions. Instead, each interview was coded by its author(s) following a common deductive coding frame. Other themes and patterns emerging from the data were coded inductively without pre-determined categories.

During the coding and the subsequent analysis, over 15 researchers from six countries and institutions worked in close collaboration, meeting bi-weekly to align procedures, refine methods, and resolve open questions. Coded data from the documents and transcripts were organised via qualitative data analysis tools such as ATLAS.ti or MAXQDA. Evolving coding frames and emerging themes were shared and discussed, iteratively refining the framework and interpretations while maintaining methodological rigour. Then, for each case, an in-depth case study report was written. These reports prioritised documentation of each case, including the relevant national and regional context; the setup of the GEP and the EDI framework in the RPO; the rationale for the EDI work; the process of GEP development and whether it was inclusive; the main action areas of the GEP, with evidence of any trends or effects; and the challenges, needs assessment, and target groups. For the two focal interventions, we documented theories of change (if articulated), implementation and monitoring processes, evaluation practices, resource allocation (including skills), the potential for sustaining change, and resistance dynamics. We included beneficiary perspectives on organisational climate and engagement with measures. We also analysed how 'success' and 'failure' were interpreted and subsequently summarised factors influencing intervention-level and overall GEP impact. Quotes were used extensively to

support key analytical statements. To protect confidentiality, these detailed case reports were not public but informed the next steps.

Part of our analytical process involved the revision and consolidation of the main facilitating and hindering factors of GEP impact. Towards this goal, case-level data were organised into an Excel file that included the thematic clustering of factors contributing to change, based upon the inductive codes that emerged from interviews and documents. Factors were divided into facilitating and hindering types, also noting possible monitoring indicators. Relationships among factors were noted but not yet aggregated into higher-order concepts. Information regarding the main facilitating and hindering factors was appended to case study reports and circulated to the broader team. This way, the confidentiality and anonymity of the cases were preserved, yet rich contextual data about each case in a structured format was shared, enabling a robust comparative analysis.

Then, multiple bi-weekly meetings were dedicated to cross-case factor synthesis using a common report template and an online whiteboard. We discussed extensively the best way to order, prioritise, and name facilitating and hindering factors. Team diversity in location, background, gender, ethnicity, discipline, and career stage enriched interpretation and required careful facilitation to balance perspectives and include contributions meaningfully. A horizontal reflexive approach whereby small group discussions alternated with plenaries helped surface diverse perspectives and mitigate potential influence from professional- and project-related seniority.

The final outcome of the analysis was the formulation of the INSPIRE Change Model, consisting of six facilitating factors for GEP impact, derived from our cross-case analysis. The model was finalised after agreement was reached among the research team. As a preliminary validation, case authors rewrote their reports into shorter summary documents organised around the six facilitating factors. The whole team assessed whether the model explained all or part of the observed GEP impacts in each case. These summaries are available in the annexe of *INSPIRE deliverable D3.6* (Müller 2023).

In the final step, researchers coded the summary reports against the INSPIRE Change Model definitions and indicators, establishing more robust associations between each facilitating factor and the intervention's impact. Where uncertainties remained or more detail was needed, the original case reports and their authors were consulted. The presence and scale of each facilitating factor across cases were mapped using the online whiteboard, creating an impact map that underpins the empirical chapters in the remainder of this book. The analysis reflects a long-term, cross-country, interdisciplinary, structured yet reflexive effort. In the next section, we discuss the implications of this approach and its inevitable limitations.

Concluding insights: comparative research on GEPs

A single-case-study design has been essential for in-depth exploration of individual contexts of GEP development and implementation. Prior case study

research identified the critical role of context-related factors in GEP success. With this comparative case study analysis, we have extracted overarching insights and formulated a conceptual framework of six factors for GEP impact that consistently affect the results of equality interventions regardless of their context. We see its future application in scientific studies and in practice as well, for evaluation of equality interventions and in planning future interventions, enabling meaningful progress towards gender equality in research environments.

Outcome + impact: data availability

A central motivation of our research concerns the focus on GEP outcome and impact. Understanding how organisational factors condition the impact of GEP interventions requires defining what 'success' looks like. Although Chapter 9 engages with this challenge in a more substantive way, it is worth highlighting that our focus on outcome and impact was challenging from the outset in terms of data availability. Even 'basic' data on vertical segregation among academic staff were often lacking in organisations, making it difficult to say anything about the effectiveness of interventions. A refocus on outcomes and impacts stands and falls with the availability of relevant data. This is important for future comparative research that moves beyond a problem-centred, diagnostic approach to gender inequalities towards improving the effectiveness and impact of interventions.

GEPs or single interventions?

The lack of outcome and impact data ultimately reinforces our decision to study and compare thematic individual interventions rather than entire GEPs. How can we assess GEPs when data are lacking on the effectiveness of individual interventions, let alone for all thematic areas commonly included in GEPs? While GEPs continue to provide a central policy instrument, especially at the European level, research on GEPs needs to focus on single interventions, first and foremost, in order to be consistent when comparing outcomes and impact, which are always intervention-specific. An emerging challenge thereby concerns organisational-level facilitating factors that are shared across interventions, e.g., strategic organisational commitment, data collection, and enforceable legislation. These facilitating factors can be the same for different equality interventions. Understanding how outcome and impact differ between interventions within a single organisation remains a challenge to be addressed in future research.

Reflecting on the use of QCA for comparative research

While the analysis of necessary and sufficient conditions for GEP impact is not the content of this chapter nor our book, the requirements of QCA have

shaped our research in crucial ways. This concerns, on the one hand, the relationship between the number of case studies to be carried out and the number of factors to be compared (in our case, six in total). As a set-based method, QCA explores all logically possible combinations of factors. Thus, conducting 35 case studies implies that a maximum of 5–6 factors can be explored meaningfully. A main challenge during our analysis consisted, therefore, in grouping evidence on facilitating factors into a maximum of six large concepts, each of which contributes in a distinct way to explain GEP impact. Although a different number of factors is possible, e.g., by proposing more fine-grained factors, the dedicated chapters of this book argue for the empirical and conceptual coherence of each factor. Future research will have to determine if, and to what extent, each factor needs to be revised, subdivided, or even aggregated at higher-level constructs.

The advantage of QCA, on the other hand, lies in its ability to make comparative research more precise. The need to define for each factor 'how' it contributes to change (i.e., the definition of the set), 'how' to measure it and establishing a decision criterion regarding the qualitative difference that separates hindering from facilitating elements (i.e., set calibration) within each factor was as demanding as enriching. It obliged us, as researchers, to not only arrive at a shared understanding of each factor but also to make explicit why and how certain elements observed during our case studies contribute to change. The very fact of defining in a more precise manner how to 'measure' success for career advancement and the prevention of GBV, demonstrated the possibilities and limits of doing comparative research on GEPs. QCA, in this sense, is an invaluable research heuristic, as it makes explicit what remains all too often implicit in qualitative comparative research, such as how central concepts are defined, understood, measured, and finally compared.

Overall—in addition to comparing in a formally rigorous way six factors, each containing at least four levels of facilitating or hindering thresholds, as this book demonstrates—QCA has forced us to make our definition of contributing factors empirically and conceptually more precise. This proved especially relevant, given the collaborative nature of our research, involving six research teams working in a distributed manner across Europe.

Ensuring comparability while maintaining qualitative depth

Finally, conducting comparative research on GEPs presents several challenges due to the inherent complexity and variability across cases. During our research, substantial efforts were made to ensure comparability, continually balancing the identification of overarching themes with the recognition of case-specific particularities. While we agreed on common, overarching themes to create a framework for comparison, smaller or context-specific factors may not have received adequate recognition and potentially limited the depth of insights into unique challenges or successes. This tension underscores the difficulty of capturing the full richness of each case while

maintaining a coherent comparative approach. Case studies are, by definition, focused on analysing specific situations. While certain patterns may emerge, each case remains distinct due to its unique contextual conditions. Legal frameworks and cultural and other factors play a significant role in shaping these differences, and this makes direct comparisons challenging. For us, it proved useful to define key aspects of gender equality from the outset, based on the EU guidelines and, later, the hindering and facilitating factors for GEP impact. This approach enhanced the comparability of the data and allowed for a clearer identification of success factors in promoting gender equality. Ultimately, while the variability and context-sensitive nature of GEP implementation posed challenges, the collaborative approach adopted by the research team was essential to mitigate them and produce robust, insightful and comparable findings.

Note

1 These include Fundació per a la Universitat Oberta (FUOC), Fraunhofer Institute for Systems and Innovation Research ISI, Notus, Radboud University (RU), Jangiellonian University (JU), and Research Centre of the Slovenian Academy of Sciences and Arts (ZRC SAZU).

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3 Strategic Organisational Commitment for change

Jörg Müller and Karolina Sikora

Introduction

The role of top management within research-performing organisations (RPOs) has become more prominent over the past decades. Universities but also research centres are transforming from relatively autonomous, state-funded and bureaucratically administered entities towards managed organisations with stronger central leadership and strategic capability (Amaral, Meek, and Larsen 2003). The introduction of New Public Management (NPM) practices has been driven by external pressures, including reduced public funding, increased competition, and demands for greater transparency and accountability (Craig, Amernic, and Tourish 2014; Teixeira et al. 2019; Ward 2012). As a result, decision-making processes have become more centralised, with top management playing a crucial role in setting strategic directions and ensuring compliance with organisational goals guided by efficiency and cost-effectiveness (Enders, Kehm, and Schimank 2015). To the degree that RPOs are becoming more managed, with top decision-making teams wielding more power (Maassen 2003), it follows that the role of top management also increases for organisational change initiatives targeting gender equality.

Having top management commit to gender equality has been widely described as a key supporting factor to achieve structural change. Already the European Commission's report on *Structural Change* published in 2011 (European Commission 2011) highlights the importance of "securing top-level support" for successful change initiatives. Similarly, synthesising the insights gained from structural change projects including SUPERA, GEARING-roles, Gender-SMART, and LIBRA, Mergaert, Cacace, and Linková (2022) identify 12 impact drivers for change, including "leadership being actively committed to gender equality/gender mainstreaming." The importance of top management support has furthermore been highlighted in the development of programme evaluation approaches for equality initiatives, as demonstrated by the Efforti project (Palmén and Kalpazidou Schmidt 2019). Examining literature beyond Europe likewise underscores the importance of engaging committed leaders in strategic change processes,

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as illustrated by the ADVANCE programme in the United States (DeAro, Bird, and Mitchell Ryan 2019; Laursen and Austin 2020), other initiatives in Asia and Australia (O'Connor 2017), and in diversity initiatives in the private sector (Wentling 2004). Overall, the existing body of literature, both within Europe and beyond, consistently underscores the critical role of top management commitment as a prerequisite for achieving meaningful and sustainable progress toward gender equality.

However, this uniform account hides important lacunae and discrepancies that remain to be more fully acknowledged and addressed. Examining the evidence base more closely in what follows shows that this broad agreement is misleading in that it operates without a clear definition of *who* forms part of the top management team (TMT), *what* top management support entails in practice, and *how* top management contributes (or impedes) successful equality change. Without a more precise definition of the 'who,' 'what,' and 'how' of top management commitment, our understanding of this crucial impact factor remains incomplete.

Who forms part of top management within RPOs is relatively easy to answer, albeit often implicitly assumed. A possible confusion exists in terms of including senior academics such as full professors as top management (O'Connor 2019), based upon the under-representation of women among full professors or in decision-making positions. However, we suggest being more precise and exclude senior academics from top management, as the shift towards a managerial university implies that power equally shifts away from the academic, towards a managerial sphere. In line with the definition provided by the GEAR tool, we suggest that top management refers to the central governing bodies and people in decision-making positions, including "(vice) rectors, (vice) chancellors, deans, presidents or executive directors" (European Institute for Gender Equality 2016:28). This is largely in agreement with Özkanlı et al. (2009), who mentions head of administrative units such as human resources more explicitly.

What top management commitment entails more precisely is harder to define. Surprisingly, a concise definition of what this type of commitment entails is currently lacking from the literature. Bencivenga and Drew (2021), for example, although affirming its importance, do not define top management commitment directly but discuss it implicitly in terms of top managers' lack of gender competence. The fact that the business literature on TMTs operates in a similar blind fashion by dragging along a poorly defined and operationalised TMT concept even after four decades of research (Krause, Roh, and Whitler 2022) shows that lacking definitions are not unique to the gender equality literature but does little to solve the problem itself. Hence, there is a general lack of defining more precisely what top management commitment really implies and how it differs from other—academic or middle management—leadership positions (Mattis 2001). We address this issue through our brief literature review in the next section.

The absence of a more rigorous definition of top management commitment then has significant implications for theory building. Without a clear definition, theoretical frameworks that explain *how* top management advances gender equality through organisational change remain fragmented and inconsistent. For example, the *Structural Change* report asserts that top management commitment contributes to long-lasting change due to a "proximity to power" which "prevents a gender policy from becoming just another policy paper, guaranteeing that the policy is actually carried out, …" (European Commission 2011:27). However, no evidence is referenced for this assertion. In fact, existing studies on the role of power and resistance do not support this claim fully, first and foremost because putting a (gender equality) policy into practice requires soft-power or bottom-up stakeholder buy-in, especially in an academic context where effective control measures are lacking (Nishii et al. 2017). Moreover, these accounts often lack a nuanced understanding of how and where power is exercised within contemporary RPOs, which typically operate through varying de-/centralised governance structures. In this context, the contribution of top management to equality change is less a matter of personal commitment and more a question of the strategic positioning of gender equality or equality, diversity, and inclusion (EDI) issues within the overall governance framework, an element that has so far been neglected in discussions of top management commitment.

Thus, while the literature broadly agrees upon the importance of top management commitment, this agreement is not based upon a shared, clear conceptual definition nor always grounded in empirical evidence. While some studies problematise the role of top management commitment as a distinct success factor for driving change (Benschop and Van Den Brink 2018), overall, there is a lack of theoretically sound and empirically grounded research in this area. To address these issues, we provide in what follows a brief review of *what* top management commitment for change entails more precisely, namely 'strategic vision,' 'actively championing change,' 'resource allocation,' and 'gender competence.' These four dimensions extracted from the literature are then contrasted with analytical insights from our 14 impact case studies of Gender Equality Plans (GEPs) across Europe, examining more specifically the role of top management commitment in gender equality initiatives. In a final step, we integrate the existing literature with our empirical findings and develop an expanded notion of 'top management' commitment that shifts towards 'strategic organisational' commitment, recognising more explicitly the transformation of RPOs towards managed organisations with stronger central leadership and strategic capability (Bleiklie, Enders, and Lepori 2017).

The four dimensions of top management commitment

The broader management literature suggests several key facilitating and hindering factors for successful organisational change. These apply not only

to gender equality or diversity initiatives but have emerged across a wider variety of organisational change projects. In what follows, we briefly review this literature and synthesise the main insights regarding the role of top management for organisational change, before diving deeper into the specific role of top management across our 14 GEP impact case studies.

Based upon a systematic literature review, Dempsey et al. (2022) identify 38 success factors for change management, among which (1) communication, (2) shared vision, (3) stakeholder involvement, and (4) top management commitment are the four top factors identified across the revised publications. A similar list is put forward by Stouten, Rousseau, and De Cremer (2018) who discuss ten factors for successful organisational change derived from an integration of management practice and scholarly literature. These include (1) assessing problem/needs for change, (2) establishing a change coalition, (3) formulating a clear compelling vision of change, (4) communicating that vision, (5) mobilising energy for change, (6) empowering others to act, (7) developing change related knowledge and ability, (8) identify short-term wins, (9) monitoring progress, and (10) institutionalising change in company culture. Furthermore, in a recent review, Errida and Lotfi (2021) identify 12 dimensions of successful organisational change management that overlap substantially with Stouten et al. (2018) and Dempsey et al. (2022): (1) clear, shared vision and strategy for change, (2) change readiness and capacity, (3) change team performance, (4) managing change, (5) resistance management, (6) effective communication, (7) motivation for stakeholders and employees, (8) stakeholder engagement, (9) leadership and sponsorship, (10) reinforcement and sustainment of change, (11) approach and planning for change, and (12) monitoring/measurement.

While these reviews include many factors that relate explicitly to TMTs, as well as other elements relevant for change management, we try to synthesise in what follows those aspects that fall into the responsibilities of top management.

Strategic vision

A central function of top management concerns setting the priorities and strategic objectives of an organisation. For contemporary higher education institutions, strategic action is assumed a necessity as they compete on a global market for students, research funds and prestige (Frølich, Stensaker, and Huisman 2017). To the degree that gender equality initiatives aim for structural change, it implies a strategic dimension that needs to be served by TMTs in terms of integrating equality objectives side by side with other strategic goals. Indeed, as Wentling (2004:171) shows, a critical success factor of diversity initiatives consists of guaranteeing long-term engagement by integrating "diversity initiatives into the corporation's goals and priorities, or the linkage of the diversity initiatives to the corporate strategic plan." Thus, top management role for successful change concerns centrally the

strategic orientation of change, including developing a clear, shared vision and strategy. Along this vein, Stouten, Rousseau, and De Cremer (2018:775) highlight the importance of articulating a compelling change vision, especially in contexts where change implies a departure from the status quo and hence a loss of privilege for some. Formulating a clear and convincing vision for change is thus crucial, especially in relation to gender equality initiatives where it is required to *legitimise* change that implies the loss of privilege for powerful stakeholders within the organisation (Rousseau 1996). Providing a strong vision and mandate and, hence, legitimisation for gender equality change is the main role of top management in this regard, according to the GEAR tool (European Institute for Gender Equality 2016). Creating a clear, shared vision for change is also a critical success factor, as it establishes the basis for stakeholder buy-in: "Indeed, successful changes require leaders to develop an appropriate and accepted vision, with measurable objectives and a strategy that guides the organization to the realization of expected benefits" (Errida and Lotfi 2021:5).

Effective communication

Communicating that vision is another key element for change. Again, the three review articles cited above converge on the importance of effective communication for change. While effective communication should be practised by all change agents involved, for top management, it has important implications in terms of authenticity, trust and credibility. In their leadership role, top management not only needs to 'talk the talk' but, importantly, 'walk the walk.' As Stouten et al. (2018:716) summarise,

> an important form of vision communication is executives who serve as role models […]. By doing so, executives signal not only their endorsement of the change but also put words into deeds and express the importance of changes ahead […].

This point is especially relevant in the context of gender equality change processes, where endorsements of equality and diversity are sometimes used to polish the public image of the organisation while the underlying structural and systemic inequalities remain untouched (Dobbin and Kalev 2017; Lipinsky and Wroblewski 2021). Top management only paying lip-service and providing rhetorical support is not infrequent, be it for race equality (Bhopal 2023) or gender equality (Benschop and Van Den Brink 2018; Holvino, Ferdman, and Merrill-Sands 2004). Sending mixed signals by endorsing equality values and goals but not enacting them undermines trust in leaders, which in turn has negative consequences for the rest of the organisation to embrace change. Thus, effective communication implies sending a consistent message (Henkel and Ade 2022) where top management embodies change efforts and leads by example (Nishii et al. 2017:57).

Resources

Third, while seemingly self-evident, it is often overlooked in practice: genuine commitment requires the allocation of resources. Demonstrating substantive support means making necessary resources available. Given the budgetary decision-making authority of top management, prioritising resource allocation across strategic objectives is a critical responsibility within their purview. For Dempsey et al. (2022), granting necessary resources, including human-, physical- and financial resources, constitutes the litmus test of top management commitment. While vision, strategy, and communication demonstrate that the upper echelon cares about equality, dedicated resources convert symbolic support and participation into actionable practice. Resources are important to initiate but also to sustain change, which entails "continuing to invest resources (leader time and effort, staffing, and money) in the change process to remind people of the urgent character of the change and keep the pace moving […]" (Stouten et al. 2018:766). Following Tildesley, Lombardo, and Verge (2022:890), we see resource allocation as part of a strategic commitment for change enacted by top management: "the scarcity of personnel and budget allocation, reveals informal norms about gender equality not being an institutional priority." Withholding or the allocation of resources to structural change are unmistakeable signals of the value of (gender) equality within the organisation.

Expertise

Fourth, top management support also hinges upon competence and leadership capacity. Stouten et al. (2018) discuss leadership skills as one element to assess the readiness for change within the organisation:

> Although change typically involves the need for training and development at all levels, […] the ability to manage planned organizational change is likely to vary with managerial education and experience. Careful attention to the change skills of senior leaders is an important aspect in assessing readiness.
>
> (Stouten et al. 2018:774)

The specific knowledge, experience, values, and preferences of management influence the assessment of the necessity and urgency for change and impinge upon the strategic choices they make (Guillaume et al. 2014:794). Importantly, competence not only refers to (change) management skills but also to specific expertise on the subject matter itself, that is, gender competence. This is a key point repeated in the gender equality literature, where top management support is largely defined in terms of having (or not having) gender competence (Bencivenga and Drew 2021). As Lipinsky and Wroblewski (2021) argue, without solid knowledge about gender mainstreaming, top management is

likely to have little impact, being unable to integrate gender equality criteria into decision-making or stimulate the transfer of feminist knowledge into organisational processes and procedures.

To summarise, top management commitment up to this point can be defined more precisely through four dimensions: 'strategic vision,' 'actively championing change,' 'resource allocation,' and 'gender competence.' Based upon their review of major change management models, Errida and Lotfi (2021) capture these overlapping elements through the concept of 'sponsorship' for change. While middle managers and other stakeholders can act as sponsors for change (Mattis 2001), the role of top management is distinctive in that it combines the strategic alignment of equality initiatives with long-term organisational goals, authorises resources, and ensures active, visible participation (Prosci 2025). The latter point is crucial as other staff involved in gender equality initiatives do not necessarily hold the authority and decision-making power to drive change, especially when encountering resistance. As sponsors of change, top management opens doors and aligns key stakeholders (European Institute for Gender Equality 2016), for example, by providing authority and legitimacy to department heads (Lagesen and Suboticki 2022). As our empirical examples, furthermore, will demonstrate, this can take various forms, including the empowerment of gender experts.

Strategic Organisational Commitment: the empirical evidence

As described in Chapter 2, we have carried out 14 in-depth GEP impact case studies across various public RPOs in Europe. For each organisation, a detailed case-study report has been written. For the empirical part of this analysis, each report was imported into Atlas.ti. Codes for a diverse set of thematic issues related to Strategic Organisational Commitment were then developed and applied. This included descriptions of the overall governance framework as well as specific structures related to gender equality or EDI, the composition of the TMT or executive board, the integration of gender-equality priorities into the wider institutional strategy, and the allocation of resources and organisational positioning of gender-equality offices. While many of the emerging themes echo issues identified in the literature, they also reveal important nuances that shift the focus from narrow 'top-management' support towards a broader notion of Strategic Organisational Commitment to structural change, as elaborated below.

Top management and governance structures

Although top management often evokes the image of autonomous decision-making by a small group of powerful executives, the reality in public universities is far more complex. Rather than operating as an autonomous entity, top management is embedded within governance structures that distribute power across multiple decision-making bodies and impose varying degrees

of accountability. This is apparent from the observed governance structures across the case studies, which, although varied, represent probably only a small set of all possible solutions to how contemporary RPOs are directed, controlled, and held accountable. Different configurations exist in terms of academic vs. administrative management and decision-making, steering and control organs. A common formula involves the rector in combination with different vice-rectors (VR) dedicated to strategic areas of the organisation, directors of administrative units such as human resources, and, depending on the size of the university, deans of faculties. The organigram of CS4, for example, which is a public university in Spain, top management positions are clearly identified and include the rector, the general secretary, and six VR managing different strategic areas of the organisation such as students or research. This is not much different from CS12 in Ireland, where the university rector presides over an executive team comprising several VR and heads of administrative units. While the composition of TMT is rather uniform across cases, its authority and decision-making power can differ considerably according to the overall governance framework, where governing bodies can exert different levels of control and oversight of top management.

The level of de-/centralisation of these governance structures can vary strongly across organisations, depending primarily on their size. The decentralisation of governance—including the governance of gender equality—is a continuum shaped by institutional design, leadership engagement, and the distribution of authority. While decentralised frameworks across different faculties can foster responsiveness to local needs, their effectiveness depends on strong, central coordination anchored in top management. The case of CS7, which is a public Dutch university, illustrates the risks of decentralisation without strategic anchoring when tackling gender equality. In this case faculties possess autonomy and resources to run their own equality initiatives, but the central EDI officer—based in HR and lacking executive authority—is unable to systematise the diverse approaches or align them with a cohesive institutional strategy. The result is fragmentation and limited visibility for gender equality or EDI efforts at the university level. By contrast, CS2 offers a more balanced model. While decentralised in implementation, with faculties developing sub-GEPs tailored to their specific disciplinary needs, the process is coordinated centrally by a top-level gender equality officer embedded in the institution's executive body. This structure ensures that decentralised efforts contribute to a shared strategic vision, supported by both institutional leadership and cross-faculty coordination mechanisms that avoid redundant efforts and make efficient use of available resources and shared solutions.

Locating gender equality in the organisational hierarchy

To the extent that top management is embedded within broader governance structures, the organisational interfaces where gender equality and

EDI initiatives and staff engage with top management often span multiple decision-making committees, communication channels, and accountability bodies—key arenas where top management's commitment to equality becomes tangible.

Gender equality or EDI offices and officers occupy different positions within the organisational hierarchy, reflecting varying degrees of access to top management—a relevant indicator of the level of importance and recognition accorded to gender equality or EDI within the organisation. First, in many cases gender equality was located at the level of a VR. As observed in CS1, CS3, CS5, CS11, and CS14, this involved, on the one hand, integrating gender equality as one item among other responsibilities into the portfolio of a VR. For example, in CS5, gender equality was located under a VR office whose main focus was on broader social policy issues. In CS1, on the other hand, the title of the VR made direct reference to EDI, giving it more visibility. On the other hand, two cases from Ireland created a dedicated VR position for EDI (CS12, CS13). A VR position exclusively dedicated to EDI provides a much stronger signal regarding its importance within the organisation, as EDI is placed on equal footing with more common VR offices such as VR for research and innovation or VR for external affairs. Depending on where gender equality or EDI is located, at the VR level, it already signals different levels of recognition and direct or rather indirect access to critical decision-making.

A second configuration observed in 5 out of 14 cases attached a delegate, deputy or a gender equality team/officer directly to the president or the rectors office (CS4, CS6, CS8, CS9, and CS11). While this appears to provide a more immediate connection to the highest decision-making position within universities, the collected case studies provide a mixed picture in terms of their implications for considering gender equality or EDI issues at the top. On the one hand, delegates for gender equality or EDI, although they enjoy a direct connection to the rector, are not necessarily part of the TMT like VRs or heads of administrative units. While providing advice and coordinating the equality agenda, they do not necessarily have direct votes in critical decision-making. Their influence, thus, is mediated through the rector. For example, in case studies CS9 and CS11, this solution was adopted in the framework of EU structural change projects, which enabled the universities to create operational ad hoc equality units on the spot. In both cases, the location at the rectors level and active support were described as crucial to advance gender equality work, such as setting up the GEP. On the other hand, however, this direct attachment to the rectors office often leaves the broader governance structure untouched, failing to integrate gender equality or EDI more sustainably. While top management commitment—especially in the form of rectors support—was key in these cases, its long-term impact for gender equality or EDI remains limited as it operates in parallel to existing power structures and relies too strongly on personal motivations by one to two central figure(s). This bears the risk of losing support for gender equality

when rectors change, as described in CS11 or other cases from the literature (Bustelo 2023). The advantage of setting up gender equality or EDI structures quickly at the rectors' level is thus a double-edged sword, as they might disappear just as quickly for the organisational governance framework. As a result, it is important to qualify the degree to which top management commitment is 'strategic,' that is, not dependent upon personal agendas but firmly integrated into the overall governance structures of the organisation.

Finally, in a third option, gender equality was neither linked to the rector nor a VR position but located within an administrative unit such as HR, constituting a specific office to advise on gender equality issues (CS7). While this has the advantage that gender equality is inserted directly at the operational level, for example, in recruitment and career promotion, it lacks access to strategic decision-making.

Gender equality competence, steering, and accountability

The importance of shifting our focus from top management towards 'strategic' organisational commitment is further strengthened when considering committees or councils that steer and oversee the gender equality or EDI agenda. These units, operating alongside Equality Officers or the Rector's delegates, play a vital role in monitoring progress and ensuring accountability among decision-makers. Again, across our 14 case studies, we observe considerable variation: some committees hold veto rights or decision-making authority on gender equality or EDI issues, while others serve primarily in an advisory capacity, and in some cases, such structures are entirely absent. For example, CS1 has an Equality Opportunities Council consisting of representatives of the wider academic community, including students and staff, which hears the propositions brought forward by the equality office and approves and finances them. CS3 has two commissions, separating the decision-making power of the Commission for Equality Opportunities and Diversity from the Steering Committee for Diversity, Equal Opportunities, and Participation. These independent equality commissions and steering units are also important to inject sufficient gender expertise into top management decision-making. They request corrections, veto decisions, steer the wider agenda, provide expertise and thus provide a remedy to the fact that members of the top executive team, including the rector seldom have sufficient gender expertise.

Given the central role of gender expertise in driving organisational change, the different ways in which equality officers and gender experts' interface with top management warrant closer examination. In most cases, people occupying top management positions in institutions were not gender experts, having little to no knowledge and experience in the matter. Equality officers often assumed this role, although the extent to which top management listened to and acted upon their advice was far from guaranteed. In some organisations, the lack of gender expertise at the top created a clear barrier

to strategic reflection and prioritisation of gender equality or EDI. In CS4, for example, the Delegate of the Rector for Equality, despite holding a formally important position, did not have gender expertise and continued to combine their political role with academic obligations. The gender equality office they coordinated was lacking knowledge and resources, further limiting its capacity for strategic action. A similar dynamic was observed in CS7, where the absence of gender expertise at the top level—combined with decentralised, under-coordinated implementation, which meant that equality work was often reduced to administrative compliance, lacking critical insight or momentum. By contrast, in CS5, the role of gender expertise in leadership was explicitly acknowledged through reference to a former VR who possessed both academic and practical knowledge in gender studies. Their presence was credited with elevating the institutional status of gender equality or EDI, ensuring it remained a strategic priority, and securing tangible commitments from university leadership.

Gender equality and equality, diversity, and inclusion as strategic priorities

As argued in the preceding section, top management commitment becomes sustainable and strategic to the degree that it is integrated into the broader governance structure of the university. An all-important element in this process concerns the integration of gender equality or EDI into strategic documents. Statutes, mission statements and strategic plans are several examples of general, university-wide documents in which long-term goals are set out, including those related to achieving greater gender equality, and as such, provide a legal basis for gender equality or EDI governance.

Similar to locating gender equality or EDI at different levels in the organisational structure, integrating these objectives into broader, strategic document(s) of an organisation can take different forms that range from mentioning equality or social justice goals in the statute of the university to placing gender equality or EDI objectives purposefully at the same level as other strategic priorities such as 'deepening research capacity' or 'building partnerships with industry.' For example, in CS12, CS13, and CS5, gender equality and EDI are explicitly mentioned as a key enabler and listed as a key priority objective of the organisation that not only grants it a clear visibility and recognises its value but also assures its implementation through concrete actions. In contrast, CS4, CS1, and CS14 integrate gender equality in the main statutes of the university without making them concrete or tying them to concrete actions. Mentioning gender equality and EDI as subordinated items of other strategic priorities, such as a "socially responsible and engaged organisation" (CS10) is another format observed. Although gender equality and EDI are mentioned as an overall value the organisation subscribes to, it bears the risk of being neglected and displaced by higher-level priorities and other more urgent needs or crises. Similarly, in CS3, gender equality was mainstreamed

into all major policy documents of the organisation. In another large group of cases, however, gender equality was not mentioned at the level of strategic planning of the university (CS2, CS7, CS8, CS9, CS11). Although in some of these cases, gender equality was supported by top management (the rector), it was strongly dependent upon the personal agenda of these key figures, without reflecting wider, long-term consensus across the organisation. Changes at the level of the rector then bear the risk that gender equality is displaced by different priorities.

Interviewees mostly described the integration of gender equality and EDI into strategic documents as hugely important, as it keeps gender equality on the agenda and provides justification for resource allocation and decision-making. Integrating gender equality into strategic documents of the organisation elevates gender equality beyond personal agendas while providing a basis for defending it in the face of other pressing needs, such as resource constraints. It thus is a further pivotal element to convert top management commitment into a sustainable 'strategic' organisational commitment.

Allocation of resources

The allocation of resources is the litmus test for top management and Strategic Organisational Commitment. Without resources—monetary or other—organisational change is unlikely to be planned, implemented and monitored. Assigning resources also converts top management commitment into credible patronage that is different from embracing gender equality symbolically without actionable support.

The resources discussed across case studies can be divided into several categories, depending on their type, source and destination. As for the type, we distinguish tangible resources, including money and physical space and tools necessary for the implementation of equality work, from intangible resources, in which the most important resource concerns permanent or temporary staff positions and allocation of time for equality work. Resources are either provided internally in the entire organisation or at the level of faculties or externally in the form of grants, funding programmes and awards. The resources allocated for equality work are either purely destined for those purposes or are included in the resources already distributed for other purposes.

The most common and crucial support across case studies consisted of one to three full-time equivalent (FTE) staff positions dedicated to gender equality or related thematic areas such as prevention of sexual violence, attention to disability, diversity and inclusion. The minimum was observed in CS14, with an equality advisor being appointed on a 40% FTE, while the maximum staff resources dedicated were at 5 FTE (CS12) and 7 FTE (CS13). In some cases (CS9, CS10, CS11), staff positions were created within EU structural change projects whose future is uncertain after funding has ended. Depending on the size of the organisation and the level of decentralisation, one FTE position was deemed insufficient in some cases (CS8, CS7) to effectively work

on gender equality or EDI across the whole organisation. For example, in CS4, the organisation dedicated 1.5 FTE to gender equality, consisting of 1 FTE administrative position and a 0.5 FTE filled by an academic position receiving a 150-hour teaching allowance. The symbolic upgrading of gender equality to a delegate to the rector was subverted in this case by insufficient resourcing to carry out effective equality work.

In addition, in some organisations, gender equality or EDI officers dispose of additional funds (e.g., monetary grants of up to 20,000 Euros) to support bottom-up initiatives, organise events, or hand out awards. In some cases, additional funds were raised externally.

In most of these cases, the lack of resources was evidenced throughout the interviews and interpreted as undermining top management's support for gender equality or EDI. In almost all case studies, resources were interpreted as an important indicator of 'real' vs. 'symbolic' engagement with gender equality. The dedication of resources elevates the importance of equality issues within the organisation and converts policy into applied practice. However, our case studies also showed that despite these dedicated resources, gender equality continues to be driven to a very large degree by volunteers. This includes members of advisory bodies or equality committees, or bottom-up staff initiatives that contribute to equality work, often without formal compensation, credit or other allowances. Sufficient resource allocation in this sense is a precondition to make equality work more sustainable in an increasingly precarious academic environment.

Conclusions: Towards Strategic Organisational Commitment

By integrating the insights across our 14 GEP impact case studies with the broader management literature on organisational change, we are now in the position to formulate a more detailed account of the role of top management commitment for structural change. We thereby shift the focus away from top management staff towards their strategic role and responsibilities.

Providing strategic vision is a crucial aspect of top management. However, while much of the scientific literature takes as its point of departure that organisational change is initiated and driven by the upper echelons, this is not necessarily the case for gender equality or EDI. Hence, the crucial question to start with concerns the visibility and location of equality issues within the organisational hierarchy and governance structure, including its link to members of the TMT. As we have seen, this can take different forms that range from an equal sharing of power through exclusive gender equality or EDI VR positions, to burying equality issues deep within the lower echelons of organisational hierarchy with little access to critical decision-making. The more and better top management commitment is part of the overall governance framework, the more strategic and sustainable it becomes. The direct participation in 'voice and vote' of equality staff at the highest level also facilitates the integration of gender equality or EDI expertise into

decision-making, underlining the importance of (gender) expertise for change as mentioned in the literature.

Finally, our case studies confirm the importance of resources for successful change initiatives as highlighted in the literature. Dedicated internal resources to gender equality or EDI are a clear sign of Strategic Organisational Commitment. It is not coincidental that substantive internal resources have been assigned to gender equality or EDI in those cases where equality staff are part of the executive team or other highest decision-making bodies. Given the importance of resources for implementing organisational change as described in the literature as well as throughout the interviews across the case studies, we suggest using it as an important catalyst for strategic change. Assigning or withholding resources enables one to distinguish symbolic support and access to power from Strategic Organisational Commitment that can effect real change. For example, gender equality delegates positions to the rector, although a sign of top management commitment, wield little influence without sufficient resources and therefore do not indicate strategic commitment; in a similar fashion, the mentioning of gender equality among strategic values and even objectives of the wider organisation depends upon resource allocation in order to be effectively implemented. Thus, there cannot be a Strategic Organisational Commitment without long-term availability of internal (and hence independent from external, competitive funding) funds. Dedicated resources to gender equality or EDI signal a real change in the value hierarchy within the organisation and a shift in power relations.

Distinguishing critical levels of Strategic Organisational Commitment

Given these reflections based upon the wider literature and our case studies, we propose the following four levels and key indicators of Strategic Organisational Commitment, as captured in Table 3.1.

Table 3.1 Four levels of calibration thresholds and their corresponding indicators and set-membership scores for 'Strategic Organisational Commitment.'

Brief description	*Indicators*	*Set-score*
Strong Strategic Organisational Commitment to gender equality or EDI	• Gender equality or EDI is placed at the same level as other priority level objectives in strategic documents. • Highest level decision-making unit exclusively dedicated to gender equality or EDI, for example, dedicated VR; guarantees gender expertise for strategic decisions. • Sufficient *internal* resources allocated with regard to the size of the organisation, likely +3 FTE, and monetary funds.	1.0

(*Continued*)

Table 3.1 (Continued)

Brief description	*Indicators*	*Set-score*
	• Steering and accountability commission composed of all stakeholder groups, independent of gender equality or EDI implementation staff, with decision-making or veto power at the top. • Symbolic and practical support is consistent and uniformly shared across the top management team.	
Organisational commitment to gender equality or EDI	• Gender equality or EDI office or delegate with frequent access to top management. Gender expertise at the top but no formal participation in critical decision-making, 'voice but not vote.' • Gender equality or EDI as one item amongst others in VR portfolio. • Gender equality or EDI is mentioned as part of strategic documents, but not a priority as other high-level objectives. • Sufficient *internal* (at least 50% or more) resource allocation with regard to the size of the organisation, 1–3 FTE. • Gender equality or EDI steering commission with little influence on decision-making; not necessarily representative of stakeholder groups, sometimes overlapping with the gender equality or EDI implementation team. • Top management support is highly dependent upon personal/individual agenda/motivation but not visibly enacted by the majority of the executive team.	0.67
Personal (top management) commitment to gender equality or EDI	• Gender equality or EDI officers with infrequent access to top management; limited to reporting; lack of gender expertise at the top. • Gender equality or EDI is mentioned in strategic documents, but in vague and general terms, not tied to explicit objectives. • Dedicated resources are insufficient or rely strongly on external funding (e.g., EU projects). • No independent steering and accountability unit; accountability in the hands of equality officers, that is, the same as implementation team. • Top management support is largely symbolic but not backed up by convincing actions; support at the top is not uniform due to open resistance.	0.33

(*Continued*)

Table 3.1 (Continued)

Brief description	*Indicators*	*Set-score*
No commitment to gender equality or EDI	• Gender equality or EDI initiatives are limited to bottom-up initiatives with little or no link to top management. • Gender equality or EDI is not mentioned in strategic documents. • No internal dedicated resources; main gender equality or EDI staff operate on a voluntary basis. • No independent steering and accountability unit, mirroring a lack of resources, and an absence of strategic vision. • Top management ignores gender equality or EDI, or actively resists or undermines bottom-up efforts.	0.0

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4 Comprehensive Data for Equalities Decision-Making

Rachel Palmén

Introduction

The shift towards evidence-based policy-making (EBPM) is widely recognised in academic literature as having gained significant traction during the late 1990s and early 2000s, particularly within the United Kingdom, the United States, Canada, and Australia (Botterill 2017). While the concept was heavily derived from "evidence-based medicine" (EBM), which gained prominence in the early 1990s (Guyatt et al. 1992) and encouraged clinicians to abandon "unsystematic clinical experience" for experimental evidence, this approach spans different social policy areas, including housing, education, social welfare, and international development—expanding to gender equality in higher education institutions (HEIs) through certification schemes like Athena SWAN.

Effective data collection and analysis—including the design of relevant policies as well as monitoring systems and the evaluation of their outcomes and impacts—has been recognised as an essential part of equalities work (European Commission and Makkonen 2016). At the organisational level, how data collection, monitoring and analysis feed into decision-making processes and strategies has been shown to affect the quality and the impact of the change process (Morales-Arevalo and Rodríguez 2025; Szukits and Móricz 2024). The development of equality, diversity, and inclusion (EDI) data gathering processes and systems has been recently linked to the quality of equality work of HEIs in Ireland (Nestor, Reilly, and Costelloe 2025). The Athena SWAN Charter is driving this approach by linking funding eligibility to institutions that are expected to collect, analyse, and act on EDI data across all equality grounds.

Various bodies of literature discuss the crucial role that data plays in organisational change processes linked to the design, implementation, and evaluation of gender equality plans (GEPs) (European Institute for Gender Equality 2016). This spans both academic literature and grey literature, providing a rich landscape of materials, including theoretical scholarly work (Kalpazidou Schmidt et al. 2020; Wroblewski and Leitner 2022) as well as practical guidelines and tools for data collection and analysis to inform the design of gender equality plans and policies (Müller 2024; Müller et al. 2025).

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Stemming from the evaluation literature, we see how the theory of change (ToC) (or programme theory) approach is a mid-way framework which enables the articulation of how an intervention programme—in theory, should work, detailing programme objectives > inputs > activities > outputs > outcomes and impacts, while factoring in context as well as assumptions (Bührer et al. 2020; Espinosa-Fajardo and Bustelo 2019). This provides a useful framework to compare intended programme or policy objectives with real achieved outcomes, thereby enabling an assessment of the implementation process—to be taken into account. This approach can be used to develop explanations as to why certain objectives have or have not been met. The assumptions on which the programme was designed are interrogated, while empirical evidence collected to prove/disprove these assumptions is collected and analysed. This framework provides a great deal of potential to integrate the gender dimension (and subsequent data collection strategies); there are, however, different ways to integrate the gender dimension into evaluation. Murthy (2018) highlights different types of gender evaluations, that is, gender-blind, gender-instrumental, gender-specific, and gender-transformative evaluation, to show how evaluators' underlying assumptions shape evaluation objectives and findings. The same analytical framework can be applied to the whole data collection process:

- Gender-blind evaluations focus on programme efficiency and effectiveness without examining gender relations. Even when they include elements like sex-disaggregated data or women on evaluation teams, they do not critically address gender issues.
- Gender-instrumental evaluations may use gender analysis, but mainly to leverage traditional gender roles to achieve programme goals. As a result, they tend to reinforce existing gender norms rather than questioning them.
- Gender- and sex-specific evaluations assess whether programmes meet the distinct needs of women and men but do not investigate whether gender relations themselves have shifted.
- Gender-transformative (or feminist) evaluations go further, examining how programmes contribute to changing power relations within organisations and society, considering gender alongside other intersecting identities (Kalpazidou Schmidt, Palmén, and Bührer 2022).

In the following chapter, we provide a brief summary of the state-of-the-art literature regarding data collection for gender equality work in research-performing organisations (RPOs) and HEIs while drawing on the work of our empirical case studies to highlight how organisations are developing data monitoring strategies and how this empirical evidence feeds into strategies and decision-making arenas in order to effect real change. We aim to paint a comparative picture of what data is collected, how it is collected, with what frequency it is collected, the necessary infrastructure and resources, and how this data feeds into decision-making processes.

Equalities data and state-of-the-art literature

The literature on data collection and analysis for equalities work at the organisational level ranges from deep epistemological debates to seemingly much more practical questions about what (or who) to count and why? Operationalising effective data collection and analysis for equalities work is a complex process whereby decisions must be made about complex constructs (e.g., what do we mean by 'gender equality'), relevant indicators need to be developed, and organisations must have the capacity to collect and analyse this data (Wroblewski and Leitner 2022).

Gender analysis goes well beyond simply counting women and men in different roles. It requires examining how an organisation understands gender, what its gender equality goals are, and what mechanisms produce inequalities—such as stereotypes that shape decision-making criteria or how the organisation presents itself publicly. Indicators can support this reflective process only if they extend beyond basic sex-disaggregated data. They must be checked carefully to ensure they do not reproduce gender bias or reinforce stereotypes. Effective gender indicators are explicitly grounded in a clear gender concept, linked to at least one gender equality objective, and able to measure progress towards greater equality within the organisation (Wroblewski and Leitner 2022). Despite this recognition, on the ground equality practitioners are still coming across difficulties in collecting what might be thought of as 'simple,' 'routine' binary sex or gender-disaggregated data. Taking an 'intersectional' approach to data collection and analysis is widely lauded, but most organisations are still struggling with collecting and analysing basic sex-/gender-disaggregated data, let alone developing robust intersectional data collection monitoring systems.

Data for equalities work can be collected through quantitative, qualitative, or mixed-methods approaches. Quantitative data turns information into numerical indicators and depends on reliable and valid measures (Advance HE 2023), typically using administrative data, human resources (HR) data sources and information systems, and surveys, including wellbeing surveys. Qualitative methods capture non-numerical insights—opinions, attitudes, and experiences—through focus groups, semi-structured interviews, document analysis, and open-ended survey comments (Ritchie et al. 2014; Strauss and Corbin 1998). This is particularly relevant for an intersectional approach when the 'small n' is often the focus of the research. Because each method has limitations, mixed-methods approaches combine their strengths: quantitative data provides a solid evidence base, while qualitative data offers a richer understanding of the lived experiences; both approaches are necessary to look at the tangible and less tangible impacts of GEPs on different groups of people (Löther, Karataş, and Weber 2023).

Data collection and analysis are necessary throughout the whole GEP process, from a first audit to the design of relevant actions and interventions, to the monitoring of these actions and interventions, to evaluating outcomes and impacts. How this process is operationalised at the organisational level

varies greatly from organisation to organisation. A great deal of evidence on this process has been produced in Europe since 2017, when the European Union began systematically funding a set of GEP implementation projects to embed structural change in research-performing and funding organisations—across science, technology, engineering, and medicine (STEM) and arts, humanities, medicine, social sciences, business and law (AHMSSBL)[1] fields. Flagships like TARGET, GEECCO, SUPERA, GEARING-ROLES, CALIPER, EQUAL4EUROPE, LeTSGEPs, MINDtheGEPs, RESET, ATHENA, and SPEAR have implemented tailored GEPs in (on average) nine-partner consortia and target outcomes such as gender-balanced decision-making, better career progression, and integrating the gender dimension into research content. The focus on GEP implementation was given a further boost in 2022 with the Horizon Europe GEP eligibility criterion. The European Commission has provided over €79 million in support to over 350 organisations for GEP uptake.[2] Each project partner has documented its data collection process throughout the audit, monitoring and evaluation of their GEPs, providing a wealth of information on this process.

The first stage of developing a GEP typically begins with a comprehensive organisational audit, designed to generate an evidence base by mapping existing gender inequalities. This tends to be based on gender/sex-disaggregated administrative data from the HR department used to chart vertical segregation (e.g., sex-/gender-disaggregated data at different grades of academic staff, A, B, C, D) and horizontal segregation (across different fields of study) (European Institute for Gender Equality 2016). Administrative data can be used to calculate other commonly used indicators, including the gender pay gap and multiple segregation indices such as the glass-ceiling index and the dissimilarity index, which capture different dimensions of gender inequality (O'Connor and Irvine 2020; Wroblewski and Eckstein 2018; Wroblewski and Leitner 2022).

This can be complemented by a survey to gauge staff and student perceptions of working conditions, climate and wellbeing on more general terms. A strong example of such an audit tool is the Gender Equality Audit and Monitoring (GEAM) survey, which provides a transferable and transnational framework for higher education and research organisations seeking to assess gender equality among academic, technical and support staff (Guyan et al. 2022). GEAM's modular design allows institutions to capture quantitative data across key domains—working conditions, organisational culture and climate, beliefs and biases, individual behaviours, and identity characteristics of respondents—thus offering a structured and comparable method for diagnosing inequalities and informing priority areas for action in the GEP (Müller 2024). Because it is primarily survey-based, GEAM is especially well suited to producing quantitative baseline indicators, which can later be used to track change over time as the GEP is implemented.

The literature reveals a major gap in monitoring how GEPs are implemented across RPOs, as only a small number of studies examine implementation

processes, and these tend to be concentrated in a few countries (Löther et al. 2023). Monitoring and evaluation are interconnected but distinct processes, both crucial for achieving lasting progress in gender EDI. Monitoring is a continuous activity that involves regular data gathering to track whether actions are on schedule and objectives are being met. It ensures that initiatives remain on course, resources are used appropriately, and any necessary adjustments can be made in real time. Under the European Union's GEP requirements, for example, organisations should produce annual monitoring reports to demonstrate how their gender equality plan is advancing. In contrast, evaluation is a more comprehensive assessment that usually takes place at the end of a project or funding period (summative evaluation), though mid-term or formative evaluations can also add value. Evaluation explores whether the work achieved meaningful outcomes and impacts, assessing both the quality of implementation (its merit) and whether it addressed a genuine need (its worth). For instance, a training session may reach its attendance goals, but if it does not enhance participants' knowledge or change behaviours, its overall impact remains limited (Occhino et al. 2025).

One of the critical issues highlighted in some of the grey literature discussing GEPs in academia is that while data collection is essential, it does not guarantee meaningful progress unless the findings actively inform organisational decision-making. Without integrating gender-disaggregated data (as well as other data on equality measures, for example, number of hiring committee members who receive unconscious bias training) into strategic planning and leadership processes, GEPs risk becoming symbolic gestures that achieve superficial compliance, rather than driving the deep structural change they are intended to create (Ginès i Fabrellas et al. 2023). Data collection is one cog in the wheel of this change process, and while the difficulties of data collection for GEPs have been lauded (Galligan, Velchikova, and McQuillan 2022), how this data is used and feeds into and triggers effective organisational change processes is less documented.

Data monitoring as embedded within the framework of a reflexive gender equality policy, as outlined by (Wroblewski and Leitner 2022), provides a useful framework from which to assess the potential of data monitoring and evaluation strategies to effect real organisational change. In this model, empirical evidence forms the basis of a reflexive process of developing and implementing gender equality interventions and policies that respond to evidence-based inequalities. In an ideal gender equality policy cycle, evidence plays a critical role throughout the whole cycle, beginning with a gender analysis or audit to identify those issues and inequality hotspots that require attention and interventions. Based on this initial analysis, objectives and priorities are defined, leading to the design and implementation of relevant actions, measures, plans, and policies. These interventions are then monitored and their outcomes and impacts, ideally, evaluated. The purpose of monitoring is to gather information on the implementation of gender equality measures, enabling timely adjustments in case of deviations from the

planned implementation. For monitoring to be effective, indicators must be derived from policy objectives and be measurable; however, in practice, the availability of data often dictates the development of these indicators rather than the predefined objectives (Wroblewski 2024).

The reflexive gender equality model relies on several assumptions, many of which are only tested during the evaluation stage. It presumes that gender equality policies are designed and implemented under certain conditions: that management is committed not only to the goals of gender equality but also to the transformation of structures and processes that contribute to these inequalities; that all stakeholders share a unified understanding of the problem, objectives, and priorities; that sufficient resources are allocated to address the issue effectively; and that monitoring is meaningful, accompanied by a willingness for strategic adjustments (Wroblewski 2024).

Methodology

This chapter charts the results of part of a wider empirical task on GEP success linked to the INSPIRE project. As part of this project, we have carried out 14 GEP impact case studies throughout Europe.

In order to develop this chapter, the author read each in-depth case study and extracted the relevant information regarding (1) main data sources and frequency of data collection; (2) data collection, infrastructure, and resources; and (3) use of data monitoring and how this feeds into decision-making processes. A cross-case table was compiled where the relevant information was collated and ordered according to (a) basic description; (b) range of case studies was ordered from—weak to strong comprehensive data monitoring/capacity—r.e., infrastructures and resources/linking to ToC; and (c) highlight good examples in each field.

The main results of this analysis are presented below.

Empirical evidence on equality data collection

Data sources and frequency of collection

Types of data sources and frequency of collection

Across the case studies, data sources and the frequency of collection vary significantly in terms of scope, regularity, and methodological sophistication. Many organisations rely on regular gender equality diagnostics, staff and student surveys, or periodic monitoring cycles (e.g., biennial monitoring in CS3) to track gender representation and systemic inequalities. Several cases emphasise annual reviews, including structured reporting through national systems (e.g., national regulation in Poland and Ireland) or institutional repositories such as Central Data Observatories (CS5). Other institutions depend heavily on qualitative data—stories, interviews, lived experiences, and informal feedback

(CS1). Some universities also use specialised domain-specific data, such as gender ratios in professorial appointments (CS2), gender pay gap data (CS10 and CS12), or annual compliance-based reports for GEP measures (CS4 and CS6).

From weak to comprehensive data monitoring

At the weakest end, several organisations display fragmented or inconsistent data practices, such as partial gender disaggregation, absence of a structured methodology, and reliance on ad hoc collection. In some instances, organisational data lacks a proper gender approach, and data are not always analysed or disaggregated sufficiently (CS4). In this case study, this situation has evolved from a bottom-up approach to data collection—where the former coordinator of the Gender Equality Unit took an interest in data monitoring and developed basic tools for monitoring and evaluation, that is, factsheets for an annual report on each GEP action. In CS1, monitoring relies mostly on individual experiences, qualitative stories, and irregular surveys, with no formal monitoring or/and evaluation system. In the middle range, organisations like CS2 and CS6 demonstrate systematic but uneven practices, so in these cases regular gender diagnostics and multi-source data collection exist, but gaps persist (e.g., limited intersectional data, inconsistency in departmental reporting, or resistance from staff). In CS2, the EDI office regularly evaluates data on the state of gender equality, enabling data analysis of representation in various status groups. A recognition of current gaps in CS6 was acknowledged by the unit and several measures were developed to improve data collection, including a questionnaire on sexual harassment and harassment grounds of gender/gender sex diversity to be launched. In one of the case studies monitoring is based on data collection regarding the general climate—as opposed to the direct impact of specific actions or interventions (CS7).

Most comprehensive systems include regular longitudinal monitoring, a clear methodology, and integration with organisational planning. CS3 conducts biennial monitoring over a six-year plan, analysing representation, contract parity, salaries, and funding. CS13 stands out as taking a comprehensive approach to data collection and analysis; this is materialised through a centralised monitoring system, annual staff surveys on discrimination and wellbeing, and as a dedicated data analyst ensuring systematic, high-quality data production.

Best examples of data collection

Top-performing cases display structured, multi-layered, and repeated data collection linked to both compliance and organisational learning. As already highlighted, CS13 provides a good example which features a dedicated data analyst, institutional surveys, centralised dashboards, and integration into Athena SWAN processes. CS5 demonstrates clear coordination through a Central Data Observatory and tailored tools with guidance for

contributions from services, centres and units, showing strong procedural clarity. CS3 provides a robust model of biennial systematic monitoring, including quantitative indicators on salaries, contracts, teaching loads, technical versus scientific employees, third-party funding received, etc., supported by reflexive evaluation. Only binary gender data is collected and analysed. Similarly, CS10 combines national standardisation, internal specialist roles, and both qualitative and quantitative data to identify wage gaps and career barriers.

Data collection infrastructure and resources

Descriptive summary

Institutional infrastructures range from minimal or informal arrangements to highly centralised and professional data systems. Many cases describe central coordination by EDI or gender equality offices, sometimes supported by HR, quality departments, or specialist staff. For example, CS2's gender equality office centrally collects, analyses, and harmonises faculty-level data, while CS6 coordinates monitoring through annual questionnaires and multiservice cooperation. A number of institutions rely on structured tools, such as standardised Excel sheets (CS5), faculty forms (CS4), or national reporting templates (CS10). Others invest in specialised personnel, like the dedicated EDI data analyst in CS13, or outsource expertise for complex analyses such as pay gap interpretation (CS6). Some institutions emphasise cross-unit collaboration—between HR, student services, research offices, and equality units—as a key resource enhancing data quality and comparability.

From weak to comprehensive capacity

On the weaker end, some cases report major infrastructure gaps, including absence of structured systems (CS1), limited gender disaggregation (CS4), or reliance on manually aggregated departmental reports (CS9). CS12 also shows limited institutionalisation: data monitoring is ad hoc, resources are insufficient, and new structures (like a planned organisational data collection and analysis unit) exist only on paper. Mid-tier examples include CS2 and CS6, where systems are coordinated centrally but depend heavily on manual reporting, personal relationships, and staff commitment—leading to inconsistency and occasional resistance. The most comprehensive infrastructures combine centralisation, dedicated expertise, automation, and integration with organisational planning. CS13 again stands out with its professionalised, centralised data functions, dashboards, and specialist analyst. CS5 is another robust example providing clear templates, guidance documents, central coordination, and structured reminders to ensure compliance and data standardisation.

Best examples of infrastructure and resources

The best examples of comprehensive infrastructures include:

- CS13: A model system featuring a full-time data analyst within the EDI office, centralised dashboards, systematic departmental reporting, and integration with national frameworks like the higher education authority (HEA) and Athena SWAN.
- CS5: A well-coordinated process with structured Excel templates, detailed instructions, central oversight, and periodic data extraction from a formal observatory.
- CS3 and CS10: Both demonstrate well-established infrastructures, combining systematic institutional data, specialist roles, national reporting obligations, and mixed-method approaches to complex metrics like pay gaps and leadership trajectories.

Use of data monitoring and evaluation linked to theory of change

Descriptive summary

The use of data for monitoring and evaluation varies from basic compliance tracking to more reflexive, ToC-aligned practice. Several institutions conduct annual or periodic reviews, discussing results in governance bodies and linking them to new GEP cycles (e.g., CS2, CS6, and CS10). Others evaluate specific programmes—such as early career support in CS1—using mixed-methods and feedback loops. Many cases highlight data-driven decision-making, such as evidence of wage gaps in CS10 leading to targeted actions or performance monitoring of gender ratios in appointment processes (CS2). Reflexive evaluation cycles appear in CS3 and CS6, where lessons learned inform forthcoming GEP measures.

Weak to strong monitoring capacity

At the weakest end are institutions where evaluation is absent or minimally operationalised. In CS7, monitoring focuses only on general organisational climate rather than charting the effects of specific interventions, making impact attribution difficult. CS12 lacks systematic ToC-driven monitoring, reporting data inconsistently and without carrying out time-series analysis. Mid-level examples include CS4, where annual evaluation forms encourage accountability but remain limited in analytical depth, while CS9 also monitors interventions and publishes reports, but staff outside the GEP team often remain disconnected from the evaluation process.

Advanced cases employ iterative, theory-informed monitoring, linking data directly to programme redesign and strategic planning. CS3 evaluates quantitative and qualitative data through a review panel that assesses not only outcomes but also aims to attribute causality and effectiveness. CS13

uses dashboards, annual surveys, and evidence-based progress assessments as part of its Athena SWAN framework, ensuring rigorous monitoring aligned with ToC principles.

Best examples of data use for monitoring and evaluation

High-performing examples include:

- CS3: A reflexive monitoring and evaluation cycle with a review panel, combining quantitative indicators with qualitative inquiry to explain results and shape future interventions. This strongly aligns with ToC principles.
- CS13: Integrating staff surveys, dashboards, annual audits, and targeted interventions while using data to shape cultural change, track representation, and inform decision-making across departments.
- CS10: Using systematic data (e.g., 'Women in Science' reports and national datasets) to identify problems (wage gaps, caregiving barriers) and feed directly into GEP action design and evaluation.

Conclusions: reflections and moving forward

This chapter attempts to build on the literature of how data is being collected and analysed for gender equality work in RPOs and universities throughout Europe. It aimed to shed light on how these data collection processes feed into decision-making to tackle a range of gendered inequalities through tailor-made targeted interventions. The reflexive gender equality policy model proposed by Wroblewski and Leitner (2022) underscores the central role of data monitoring and evaluation in driving meaningful organisational change. Within this framework, empirical evidence is not an afterthought but the foundation of a continuous reflexive cycle in which gender inequalities are identified, addressed, and reassessed. An effective gender equality policy cycle depends on evidence informing each stage—from the initial gender analysis that highlights inequality hotspots to the formulation of objectives and priorities and finally to the design and implementation of targeted interventions. Ongoing monitoring and evaluation are crucial for determining whether actions are implemented as intended, whether they are achieving their aims, and whether strategic adjustments are required. Our case studies demonstrate that RPOs and universities are a far cry from this 'ideal model.' The model also highlights that monitoring can only function effectively when indicators are aligned with policy objectives and are measurable. However, in practice, data availability often shapes indicator development more than the objectives themselves (Wroblewski and Leitner 2022), underscoring the persistent gap between ideal policy design and real-world constraints.

Importantly, the reflexive gender equality model rests on a series of assumptions that may only be fully tested during evaluation. It presupposes strong management commitment not just to gender equality goals but to

the transformation of the underlying structures and processes that sustain inequality. It assumes a shared understanding among stakeholders regarding the nature of the problem and the priorities for action. It also relies on the allocation of sufficient resources to implement meaningful interventions and on the willingness of institutions to engage in strategic adjustments when monitoring reveals deviations or emerging challenges. Without these enabling conditions, the transformative potential of data-driven and reflexive gender equality policies remains limited (Wroblewski 2024). As we've seen from our case studies, comprehensive data for equalities decision-making is not the 'norm' but the exception; our case studies were more likely to be classified as carrying out some form of data collection for equalities work but not carry out systematic data collection and analysis that directly feeds into decision-making or as engaging in ad hoc data collection. Even within those universities and research organisations that can be classified as having well-established comprehensive data for equalities decision-making, issues still persist.

Recent literature from Ireland discusses the national requirement that every HEI establish a "comprehensive gender-disaggregated data collection system" presents varying levels of difficulty across institutions. To understand these challenges, Nestor et al. (2025) conducted a survey of EDI staff in 19 Irish HEIs, achieving a 100% response rate. The results indicate that 26% of participating institutions have begun to address capacity and capability gaps by hiring data analysts—often reflecting earlier engagement by long-established universities with the charter and earlier recognition of the need to allocate resources to meet data demands, with the first such roles appearing in 2019. However, even HEIs that have appointed data analysts continue to face substantial obstacles, including system constraints, data accuracy problems, and limited access to national benchmarking datasets. For institutions that have yet to recruit technically skilled data analysts, the process of gathering, analysing, and reporting data remains particularly demanding. These difficulties are expected to intensify as reporting obligations expand, such as the HEA requirement to collect ethnicity data from 2022, as well as duties arising from human rights and equality legislation and gender pay gap reporting. Survey findings also show that 85% of HEIs favour the creation of a national data collection system covering all institutions. Furthermore, all respondents indicated that their EDI units would benefit from increased support and guidance from the HEA's centre of excellence for EDI regarding data collection practices. When asked about the establishment of a national network of HEI EDI data practitioners to enable peer learning and the exchange of best practices, 95% expressed support for this proposal (Nestor et al. 2025).

These findings support the work that we have carried out in the INSPIRE project. Data collection obligations and legislative requirements often provide the much-needed impetus for organisations to take this work seriously. They can also provide a necessary framework, so data collection efforts become to some degree standardised, and organisations do not invest lots of time and effort reinventing the wheel. There is, however, a further need

to support capacity building in developing robust data collection systems, including data analysis and monitoring systems linked to targeted interventions. The feedback loop between monitoring interventions and equalities decision-making also needs to be strengthened.

While most organisations are collecting and analysing basic sex-/gender-disaggregated data in some form or another, there is a long way to go. Increasing the capacity and competences of organisations to develop information systems that are capable of extracting useful, relevant data for equalities work is necessary. Data collection and analysis for equalities work need to be strengthened, with resources and capacity building for increased competencies in data collection and analysis.

Distinguishing critical levels of comprehensive data for equalities decision-making

Informed by our examination of the wider literature and the findings from our case studies, we propose four levels and their key indicators for comprehensive data for equalities decision-making, detailed in Table 4.1.

Table 4.1 Four levels of calibration thresholds and their corresponding indicators and set-membership scores for 'Comprehensive Data for Equalities Decision-Making'

Brief description	*Indicators*	*Set-score*
Comprehensive data for equalities decision-making	• Data collection and analysis are implemented on a continuous basis. Equality data needs have been standardised and mainstreamed into organisational processes and infrastructures. Comprehensive professional, centralised equality data collection infrastructure including dedicated personnel and resources. • A variety of qualitative and quantitative data sources are used: administrative data (e.g., wage gap), surveys (wellbeing, gender-based violence), incident reports, focus groups, interviews, and clinics. Indicators and measurement scales are of high quality, adhering to guidelines for equality data collection. • Data captures representation, experiences, outputs, outcomes, and impact. Comprehensive targets and monitoring indicators. Evaluation of outcomes and impact of interventions. Data is trusted and essential for tracking progress and accountability. Data is inserted into reflective practice and, hence, evidence-based decision-making across organisational units and hierarchy.	1.0

(*Continued*)

Table 4.1 (Continued)

Brief description	*Indicators*	*Set-score*
Data collection for equalities work	• Data is collected at least twice, that is, at the start and end of a GEP lifecycle. Basic GEP implementation indicators (e.g., participants of training activities) are available. Some standardised data collection instruments (e.g., survey) are available. Occasional buy-in of professional external data advice (e.g., statistician). • A variety of data sources are used, including HR data, surveys (e.g., wellbeing), and interviews. Data sources and measurement instruments are of medium quality, being designed ad hoc, unaware of guidelines for equality data collection. • Data on balanced representation, staff experiences, and outputs; feeds into GEP audit, design, including monitoring during implementation. Data documents inequalities but does not track progress regarding impact, which is not part of decision-making/ accountability.	0.67
Ad hoc data collection	• Isolated data collection, for example, once during an initial GEP audit to establish a (partial) picture of gender inequalities. Data is fragmented and difficult to access, unsustainable effort. Sporadic attempts at data collection in specific units are undertaken by non-professional staff in response to identified needs. • Largely using existing administrative and HR quantitative data (e.g., type of contract, positions). Data collected follows administrative needs rather than equality objectives. • Data mainly geared to capture women's underrepresentation. Collected data feeds into the design of interventions stipulated in the GEP. No robust evaluation of the outcomes and impacts of actions. Data is not part of decision-making processes.	0.33
No data collection	• Data collection is non-existent. Efforts to collect equality data are blocked. • Data reflects anecdotal 'evidence'; no primary data available, and if available, remains fragmented and low quality. • Data, to the degree available, reinforces existing stigmatisation. Unreflective benchmarking undermines equality goals.	0.0

Notes

1 Equal4Europe classification.
2 https://research-and-innovation.ec.europa.eu/strategy/strategy-research-and-innovation/democracy-and-rights/gender-equality-research-and-innovation_en.

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5 Advanced Gender Knowledge for structural change

Lorena Pajares Sánchez and Paola Chaves

Introduction

Despite decades of gender equality initiatives, academia remains marked by persistent gender inequalities that are embedded in norms, rules, everyday practices, discourses, and formal and informal networks and structures, all reinforced by neoliberal logics (Chaves and Benschop 2023; O'Connor and White 2021; Poggio 2022; Van Den Brink and Benschop 2012). These inequalities shape not only organisational practices but also the production and valuation of knowledge itself. Hence, a circular dynamic emerges, where, while gender knowledge is essential for challenging inequalities, existing inequalities constrain the conditions for producing such knowledge, thereby limiting its transformative potential.

In this context, there is agreement that a multiplicity of approaches is necessary to transform higher education organisations. Within them, expert gender knowledge has been widely recognised as an essential asset for effective structural change, especially under Horizon Europe (European Commission 2021). Notwithstanding, there is a lack of conceptual clarity on *what kind of gender knowledge* enables change and how it does so.

At the macro level, this involves understanding how universities operate as knowledge producers within neoliberal frameworks, in a context where Western universities have historically acted as gatekeepers of knowledge across the world, setting the standards for what knowledge is considered valuable on a global scale (Federici 2009; Mignolo 2000; Verloo 2018). Within this scenario, gender knowledge has not been highly valued and has even been ignored. At the micro level, it implies analysing where, by whom, how and which knowledge is needed, produced, valued, and sustained within the specific institutional context. It also requires analysing which ontologies and epistemologies are used for gender and for equality, diversity, and inclusion (EDI) policies, shaping their ability to transform, or not, institutional structures, practices, and cultures.

Building on feminist and decolonial scholarship, this chapter focuses on the role of knowledge, particularly gender knowledge, in fostering and sustaining change towards equality in higher education institutions. It introduces and

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elaborates the concept of Advanced Gender Knowledge (AGK), examining how knowledge production, epistemic authority, and institutional contexts shape the transformative potential of gender equality plans (GEPs) and EDI interventions. Moreover, it critically explores whose knowledge counts in institutional change processes and how feminist, intersectional, and decolonial knowledge can be mobilised for structural transformation.

Gender knowledge and the process of knowing for structural change

From gender expertise to Advanced Gender Knowledge

Gender expertise has become a central requirement in European gender equality policy frameworks. One of the process-related requirements for the GEP eligibility criteria in Horizon Europe entails a commitment of dedicated resources, including 'expertise in gender equality'. As Mergaert, Cacace, and Linková (2022) argue, having in-house gender expertise is a key indicator for success in structural change. Yet, while the relevance of gender expertise is widely acknowledged, less attention has been paid to what this expertise consists of and how it contributes to institutional transformation. According to Kunz and Prügl (2019), gender expertise is a multi-faceted field that includes specialised knowledge, policy expertise and performance or practice. It therefore comprises theoretical—often called 'academic'—knowledge rooted in gender studies, with practical and experiential knowledge rooted in practitioners' tacit understanding of how organisations operate and how to navigate their power structures.

However, some scholars have critically examined the concept of 'gender expertise' for its potential instrumentalisation, where organisations may superficially adopt gender equality measures to maintain credibility without genuine commitment (Ferguson 2019; Kunz and Prügl 2019). They warn of the risk of depoliticisation when gender expertise is disconnected from feminist agendas, as this can reduce equality efforts to a bureaucratic box-ticking exercise with little transformative impact (Ahmed 2007; Garforth and Kerr 2009; Longwe 1997). In response to these limitations, these scholars advocate the use of broader concepts such as gender or feminist knowledge.

Gender knowledge has been defined as the knowledge that provides an analysis of how gender relations are constructed and perceived, as well as an understanding of the normative and epistemic barriers that hinder gender equality policies. It examines the mechanisms that sustain gender inequalities within institutions (Cavaghan 2010). Meanwhile, Cullen, Ferree, and Verloo (2019) define feminist knowledge as reflexive, collectively produced, and explicitly committed to transforming intersectional unequal power relations. This knowledge introduces an ethical dimension, as it demands political engagement and a commitment to justice (Pajares Sánchez 2020). According to Verloo (2018), feminist knowledge considers organisational contexts as

sites of epistemic power and provides valuable narratives that challenge how knowledge production reproduces or counters gender inequalities, unveiling the role of epistemic dynamics in opposition to feminist agendas.

Rather than treating gender and feminist knowledge and expertise as competing approaches, this chapter conceptualises them as complementary. Agreeing with Bustelo, Ferguson, and Forest (2016) that the opposition of gender vs. feminist knowledge constitutes a false dichotomy, we propose a synthesis of these perspectives in what we call AGK: a blend of theoretical, practical, and experiential knowledge that understands gender inequality as a structural and systemic phenomenon.

AGK approaches knowledge from a decolonial feminist perspective that recognises that all knowledge are epistemically situated within unequal relations of power, marked by processes of colonisation, dominance, and marginalisation (Grosfoguel 2007). This approach aligns with the notion of "systemic gender knowledge" (Lansu, Bleijenbergh, and Benschop 2019), shifting the focus away from individualised explanations of inequality towards the institutional, cultural and epistemic conditions that sustain it. AGK values bottom-up generated knowledge and includes a participatory and results-focused dimension, standing as an action-oriented knowledge, which provides specific tools to measure and inform decision-making, as well as frameworks for understanding experiences of diversity and inequality through individuals' own narrations and experiences (Gagnon, Augustin, and Cukier 2022). Ultimately, this knowledge serves the purpose of structural transformation by (1) including feminist agendas and (2) going beyond managerial fixes, ensuring that feminist principles are not diluted when translated into bureaucratic practices (Longwe 1997).

Taken together, AGK comprises four interrelated components. First, it integrates feminist scholarship, making it politically and ethically grounded, explicitly oriented towards social justice. Second, it incorporates practitioners' situated understandings of institutional dynamics, acknowledging how gender equality and EDI efforts are shaped by specific organisational contexts and power relations. Third, it draws on decolonial North-South perspectives that understand knowledge production as embedded in unequal epistemic relations. Fourth, it is action-oriented in a transformative sense, providing frames and tools that inform decision-making by enabling actors to critically assess existing practices, challenge dominant institutional logics, and design interventions aimed at structural rather than merely procedural change.

Epistemic foundations for Advanced Gender Knowledge

Knowledge production can be defined as the practice of creating, researching, analysing, and documenting critical ideas that provide insights about world phenomena (Nketiah 2019). It is embedded within wider *knowledge regimes*, understood as the legitimate conventions and hierarchies that enable that knowledge production (Jones, Dy, and Vershinina 2019). Feminist

epistemologies focus on transforming structures and relationships through knowledge creation processes. In this vein, Rita Nketiah (2019) describes knowledge creation as a "way to own our narratives", which implies understanding that knowledge is not one, universal and objective, but many knowledges in conversation (Blaser 2013; Blaser and de la Cadena 2018; Mignolo 2000, 2009). Epistemic exclusions, by contrast, define which narratives are valued and which producers of knowledge are deemed legitimate (Settles et al. 2021).

While knowledge production has largely been not only a male undertaking but also a predominantly white and economically privileged one (Grosfoguel 2013; Rosa and Clavero 2020), much of the work of feminist scholars has been to disrupt the ways in which institutionalised patriarchy has denied, excluded and exploited the work of women and minoritised communities (Nketiah 2019). In this realm, two further aspects help in understanding the capacity of AGK to challenge knowledge regimes and epistemic exclusions.

The first deals with epistemic authority. As described by Clavero and Galligan (2021), drawing on Miranda Fricker's contribution (2007), there is a dynamic of epistemic injustice where the credibility a person is afforded does not match what she deserves due to prejudices about her social group, thus being epistemically excluded. This perspective helps us in understanding that holding gender knowledge may not be sufficient to bring about change if one is not endowed with epistemic authority to allow its enactment, in the same way that holding office is not always enough to ensure change (Monroe et al. 2008). Granting epistemic authority to gender experts and to those who have traditionally been epistemically excluded contributes to the shift in power hierarchies and enables transformative knowledge to permeate organisational culture and influence decision-making. The second deals with how epistemic exclusion can be more severely experienced by those in 'othered' positions, where multiple discriminatory conditions intersect. In this sense, knowledge production needs to apply an intersectional critical lens to be able to uncover macro/micro power relations (Haynes et al. 2020).

Therefore, the transformative potential of AGK does not depend solely on the availability of feminist insights but on the conditions under which such knowledge is produced, recognised, and authorised within institutions. By foregrounding knowledge regimes, epistemic authority, and intersectional forms of exclusion, AGK examines how power operates through processes of knowledge creation, validation, and marginalisation. These dynamics are central to understanding why gender knowledge may fail to translate into structural change and, conversely, under which institutional conditions AGK can effectively inform practices and decision-making in research organisations.

Operationalising Advanced Gender Knowledge for structural change

Operationalising AGK requires, first, engaging with the institutional logics that shape decision-making in higher education organisations and translating

feminist frames into transformative approaches that inform such logics from a social justice perspective. With this aim, AGK provides a structural approach that prevents interventions from remaining at a superficial level or being tackled as a matter of numbers or individual awareness and engages in dismantling the epistemic exclusions and deeply embedded assumptions that marginalise some privileging others (Jaquetto Pereira 2025; Lansu et al. 2019; Mahajan, Bleijenbergh, and Benschop 2025). AGK also provides insights for critically understanding business-case frames, which prioritise economic or performance-related outcomes over structural transformation. While this framing may facilitate short-term legitimacy, it often promotes a double agenda that leaves the underlying power structures untouched (Michali, Angeli, and Eleftherakis 2023). Feminist scholars have criticised business-case approaches for undermining the primacy of rights-based justice arguments and for co-opting gender knowledge into instrumental and utilitarian frameworks at the expense of rights-based and justice-oriented arguments (Clavero and Galligan 2021; Cullen et al. 2019). However, being knowledgeable about these logics from an AGK perspective enables actors to recognise how dominant rationalities operate while remaining anchored in feminist agendas. In this sense, familiarity with business-case arguments can function as a tactical resource, allowing change agents to develop 'small wins' approaches based on incremental strategies that build momentum for broader transformation (Mackay 2021). These strategies rely on deep institutional knowledge of formal rules, informal norms and historical legacies and are particularly relevant given the precarious and often marginal position of those seeking to challenge the status quo from within (Bustelo et al. 2016; Chappell and Mackay 2021).

A second mode of operationalisation relates to formal policy processes and to how AGK feeds organisational learning through the GEP cycle. At the design stage, it provides inspiring practices and state-of-the-art insights related to the five thematic areas recommended under Horizon Europe (EIGE 2022; European Commission 2021). It also supports the identification of structural causes of inequality and the formulation of context-sensitive objectives, contributing to establishing a theory of change that considers the relationship between causes, aims, and actions required to achieve them (see Chapter 9). During implementation, it provides analytical frames to assess how actions interact with existing organisational practices and power relations. Here, the implementation of GEPs can foster organisational learning through data collection, inclusive discussion spaces, or comprehensive reviews (Clavero and Galligan 2021; Zippel and Ferree 2019). In this process, the legitimation of in-house gender expertise—either through working groups, research networks, projects, or centres—has proved critical (Mergaert et al. 2022). Monitoring and evaluation, in turn, become moments of reflexive learning, in which feedback mechanisms allow institutions to reassess assumptions, recalibrate interventions, and adjust strategies (Zippel and Ferree 2019). Here, AGK is operationalised not as a checklist for compliance, but

as a lens through which formal policy instruments are continuously interpreted, questioned and recalibrated in relation to social justice, equality, and intersectionality.

A third mode of operationalisation concerns training, as one of the main channels through which gender knowledge circulates within organisations. Training plays an important role in increasing awareness, introducing shared conceptual frameworks, disseminating findings, and fostering reflexivity around privilege, agency, and inequality (Mahajan et al. 2025; Van Den Brink 2020; Zippel and Ferree 2019). However, research shows that training alone rarely leads to sustained organisational change, as increased awareness does not automatically translate into altered practices of decision-making (Ferguson 2019; Lombardo, Naldini, and Poggio 2024; Powell, Ah-King, and Hussenius 2018). Its effects are often limited by a lack of continuity, insufficient buy-in from decision-makers, or weak institutional follow-up. Training should therefore be understood as a complementary and situated tool, effective when embedded into broader strategies (Callerstig 2016) that link learning to authority, accountability, and contextual processes. In this sense, training's transformative potential depends on how it acknowledges the relation among the macro, meso, and micro levels and how it connects strategic action to formal policy mechanisms such as GEPs.

Resistances to Advanced Gender Knowledge

While AGK integrates different types of knowledge that hold the potential to contribute to processes of change, these forms of knowledge often remain marginal, ignored, undermined, contested, and resisted (Cullen et al. 2019; Jones et al. 2019; Lombardo et al. 2024; O'Connor and White 2021). One illustrative example is the persistent resistance to gender training, manifested in myriad forms yet similar across a wide range of contexts (Ferguson 2019). Moreover, universities often express a performative commitment to gender equality but resist deeper structural change. Ultimately, the problem remains that gender knowledge is seldom consulted or included in decision-making processes (Lipinsky and Wroblewski 2021), limiting its capacity to reshape scientific and administrative logics.

These resistances of the dominant epistemic community to diverse feminist ways of knowing can be explained by the disruptive potential of feminist knowledge in destabilising the established social order of knowledge production, becoming "dangerous knowledge" (Bell et al. 2020). When in-house AGK is put at the service of organisational practices and policies for structural change, its disruptive potential against the institutional status quo is further sharpened. This explains why resistance to structural change often manifests through the questioning of feminist knowledge and those who produce it, rather than through direct opposition to formal policies.

Methodology

This chapter draws on 14 GEP impact case studies across higher education institutions in Europe. During data collection and analysis, gender-related knowledge emerged as a central factor enabling institutional change. We therefore examined how gender equality and EDI were framed and how diverse forms of knowledge and approaches were used and mobilised in practice in each case to shape institutional transformation.

We developed a set of indicators to assess the extent to which organisations integrate AGK into their policies and interventions. This process was accompanied by sustained epistemological reflection, particularly regarding the tension between capturing complex epistemic dynamics and translating them into assessable indicators. We questioned how far epistemic considerations should be operationalised and to what extent deeply philosophical debates about knowledge, power, and transformation can be meaningfully translated into quantitative measurements. The indicators were refined through iterative coding and comparative analysis of the case studies, supported by abductive validation against empirical evidence and insights from the literature. This iterative process between theory and data resulted in a sufficiently robust set of indicators capable of explaining—and cautiously assessing—the integration of AGK in practice.

Results of comparative analysis: Advanced Gender Knowledge in practice

Framing gender equality and equality, diversity, and inclusion: concepts and approaches

While gender equality remains the central concept, most case studies have expanded their framework to include broader concepts such as diversity, inclusion, disability, sexual orientation, gender identity, race, ethnicity, and even decolonisation, slowly integrating them into interventions and policies (see Table 5.1). Notably, this progress entails ongoing debates. Some interviewees warned that a broader focus may sideline specific gender issues (CS8), while others noted that integrating gender with other equality concerns can render certain forms of discrimination invisible or lead to competition for resources (CS7). There were also concerns that well-established terms have become 'politically correct', constraining more innovative discussions (CS6).

Intersectionality is increasingly prioritised as a transformative lens for addressing overlapping social identities and power dynamics. However, despite its growing visibility, its integration into policy and practice remains uneven and challenging (CS1, CS3, CS5, CS8, and CS10). For instance, attention to multiple diversity dimensions is evident in some appointment processes but remains limited to isolated practices rather than institutionalised approaches (CS1). In several cases, intersectionality is framed as an

Table 5.1 Key gender equality, EDI, and related concepts identified throughout the case studies

Concepts	*Presence in case studies*
Equality, equal opportunities	All cases
Equity	3, 4, 5, 7, 8, 9, and 11
Gender equality	All cases
Gender parity	1, 3, 4, 7, and 11
Gender/sexual identity and expression	1, 2, 4, 5, 6, 8, and 12
Sexual orientation and LGBTQIA+	4, 5, 6, 8, 11, 12, and 13
(Anti-)discrimination	1, 3, 7, 9, 10, 11, 12, 13, and 14
Diversity	All cases
Inclusion	1, 3, 7, 8, 9, 10, 12, 13, and 14
Disabilities/functional diversities	1, 3, 5, 8, 11, 12, and 13
Race/racism, ethnicity, minorities, migrant origin	3, 5, 7, 8, 11, 12, and 13
Racial equality	12 and 13
Internationalisation	1, 3, 4, and 8
Intersectionality	1, 3, 5, 7, 8, 9, 10, 12, and 14
Social safety/responsibility	7 and 10

aspiration but narrowly operationalised, with different categories addressed separately—such as LGBTQIA+ support or socio-demographic data collection—under an additive approach rather than an integrated one (CS3 and CS12). In other instances, intersectionality is primarily discussed by feminist scholars yet absent from institutional policies and practices (CS4). Elsewhere, actions rely on broad notions of inclusivity without addressing the specific inequalities faced by different groups (CS8).

In a smaller number of cases (CS12 and CS13), national legislation promoting related concepts, such as racial equality, reinforces gender equality policies and fosters institutional support for AGK, strengthening the institutional conditions for feminist and historically grounded understandings of inequality. Overall, however, these findings indicate that most institutions are still at an early stage in operationalising intersectionality and often do so without systematically drawing on in-house expert knowledge.

Different approaches to gender equality and EDI were found (see Table 5.2). In most cases, social justice is mentioned (10 out of 14 cases), although in some instances, GEP implementation is underpinned by a combination of social justice and the business case (CS4, CS5, CS10, and CS13). This dual rationale reflects practitioners' adaptive strategies to mobilise AGK within institutional contexts, enabling them to gain support (CS13), respond to stakeholder priorities (CS10), and navigate resistances (CS4). Nonetheless, it can also weaken the coherence of institutional narratives and expose gaps between stated values and practices (CS9). Moreover, while useful for negotiation, an overreliance on business-case arguments risks reinforcing neoliberal logics.

Table 5.2 Main approaches to gender equality identified in the case studies

Approach	*Cases*
Social justice	2, 4, 5, 6, 7, 9, 10, 12, 13, and 14
Business case	4, 5, 10, and 13
'Small wins'	13 and 14
Awareness raising	2, 4, 7, 9, 10, and 11
Structural change	1, 3, 4, 5, 6, 13, and 14
Decolonial	7

Note: The approaches listed do not necessarily represent the case study institutions as a whole. In some cases, they are formally declared in the institutional policies, while in others, they were identified in specific groups, actors, or units

Between social justice and business-case strategies lies the 'small wins' approach, which gender practitioners and scholars strategically use to effect real change. For instance, practitioners use a small win approach to make the problem tangible, build trust, encourage participation, or maintain buy-in, resulting in tangible outcomes (CS13 and CS14). Only one case highlights the 'inclusion of individuals from the Global South', with a project aiming to tackle racism, decolonisation, and intersectional discrimination (CS7), moved by a strong bottom-up pressure. Given the colonial past of many countries in Europe, this is an important step for cultural change and epistemological diversity; nevertheless, this is not yet a concern globally shared within academia.

A major challenge lies in shifting from an awareness-raising approach to a structural change approach. While awareness-raising measures are widespread and can help build acceptance, interventions that address deeper institutional inequalities are slower to implement and often encounter resistance (CS4, CS5, CS6, and CS9). Although structural change is frequently articulated as an objective in policy documents, the measures actually implemented reveal a limited presence of genuinely structural interventions (see Table 5.3). Positive action measures remain largely absent, and several cases label measures as structural even when they reflect 'fix women' premises (CS1, CS2, CS4, CS9, CS10, and CS13). In some institutions, awareness raising is prioritised to manage potential pushback (CS9) or to project a progressive image, particularly in less favourable social and cultural contexts (CS10).

Against this backdrop, two areas were examined more closely to assess how structural change is pursued in practice: career progression and gender-based violence (GBV).

When examined through the lens of AGK, this career progression measures represent necessary but partial steps towards structural change. They address barriers in recruitment, promotion, or pay, often operationalised through procedural adjustments such as gender-sensitive metrics, mentoring schemes, or the inclusion of EDI promotion criteria. While these interventions are valuable in reducing inequalities, they remain largely framed

Table 5.3 'Structural interventions' mentioned in case studies

Topic	*Interventions*	*Cases*
Career progression	Gender-sensitive evaluation metrics and active recruitment strategies (incl. training and advice)	1, 2, 3, 7, 9, 12, and 14
	Curricular care-compensation coefficient.	5, 6, 8, and 13
	Care-compensation criteria for work- or grant-allocation (e.g., intensive-research status; discharge of teaching)	
	Integration of EDI work as a promotion criterion	12
	Female PhD/early-career support and dedicated funding, career counselling and mentoring; peer-to-peer support PhD network	1, 2, 4, 9, 10, and 13
	Involvement of the EDI office in oversight of research projects and improvement of gender-inclusive teaching	1
	Supporting/awarding the integration of the gender dimension in teaching and research	4, 7, 10, and 11
	Training itinerary on gender within the transversal teaching activities of doctorate school; cross-cutting gender modules	4
	Appreciative appointment management and training on gender-sensitive appointments	1
	Targeted measures for gender pay gap reduction	10
Prevention of GBV and harassment	Anti-harassment commission with feminist scholars and trained representatives of all groups	5
	Label awarded to centres meeting certain requirements, including counting on at least one member of the governing team trained in GBV and harassment	5
	Complaint office with standardised procedures, sufficient staff and status group representatives; compulsory representation of key units to avoid revictimisation	1, 5, and 8
	'Purple' contact points/commissioners in each faculty/centre with both prevention and complaint-handling responsibilities	5, 6, and 11

within dominant logics of excellence and compliance and tend to focus on supporting individuals rather than transforming the underlying hierarchies of academic reward systems. Moreover, they rarely engage intersectional or decolonial critiques, thereby risking the reproduction of privilege within institutional frameworks.

GBV and harassment interventions, by contrast, emphasise institutional mechanisms of prevention and response, such as commissions, complaint offices, labelling schemes, and 'purple' help points. These mechanisms are crucial for establishing accountability and signalling institutional commitment. Yet, they often reflect a compliance-oriented approach that formalises procedures without necessarily shifting entrenched cultures of violence and inequality. While measures such as anti-harassment commissions involving feminist scholars move closer to feminist principles, most interventions remain limited in their attention to intersectional vulnerabilities or alternative, community-based approaches to justice.

Taken together, these two clusters show that interventions often operationalise gender knowledge at the level of procedures, indicators, and numerical targets, while leaving underlying power relations largely intact. By contrast, interventions informed by AGK address power more directly by reshaping decision-making processes, redistributing authority, and embedding feminist expertise within core institutional structures. Measures that challenge reward and evaluation systems, reconfigure career norms, or institutionalise feminist knowledge within governance arrangements demonstrate particular transformative potential. However, this potential is materialised only when such measures are implemented as part of a broader social justice-oriented strategy that explicitly confronts whose knowledge counts, who decides, and how organisational priorities are set.

Locating and mobilising Advanced Gender Knowledge

Counting on in-house AGK seems paramount across the case studies to put in motion more solid and innovative initiatives. AGK is primarily located within specific institutional sites, most notably gender or feminist research centres, EDI units, and specialised roles. Universities hosting gender or feminist research centres report that these function as key hubs for advancing gender equality, shaping institutional discourse, and fostering systemic change (CS4, CS5, CS11, CS13, and CS14). Often rooted in long-standing traditions of women's and gender studies, these centres generate critical insights into gendered power relations and, in some cases, contribute directly to GEP implementation, for example, by informing policy development (CS5 and CS14) or catalysing bottom-up initiatives (CS11). While typically situated within the social sciences, their influence may extend across faculties, supporting curriculum development, accreditation processes and the integration of the gender dimension into teaching and research. However, despite their epistemic relevance, their incorporation into broader institutional frameworks often remains fragmented, underfunded, and sometimes actively resisted.

Beyond research centres, AGK is also mobilised through specialised professional roles and training infrastructures that enable knowledge to circulate within organisations. The case studies show sustained investment in

tailored gender and EDI training aimed at specific groups such as recruitment committees, leadership teams, students, or professional staff (CS4, CS9, CS12, and CS13). Training is used not only to raise awareness but also to support the practical application of gender and EDI principles in organisational procedures, often drawing on the expertise of specialised staff such as gender data managers or sexual violence prevention officers (CS5, CS10, CS13). Training formats range from e-learning and train-the-trainer models to arts-based and participatory methods, and in some cases are embedded in management training or broader awareness-raising strategies or linked to institutional incentives (CS3, CS4, CS5, CS6, and CS7). Concurrently, the cases point to persistent limitations, including uneven trainer expertise, weak structural analysis, low participation from senior management, and limited integration into everyday practices. Intersectional perspectives and targeted engagement with men remain rare (CS4 and CS12).

The mobilisation of AGK is further shaped by how different forms of knowledge are valued and sought to feed organisational logics. The cases distinguish between academic (theoretical) and practical (institutional or administrative) gender knowledge, which is recognised and deployed differently. Academic knowledge is often mobilised to evidence inequalities, legitimise the need for change, and design systemic interventions, thereby conferring epistemic status on gender equality beyond bureaucratic compliance (CS7). However, its influence is frequently constrained by hierarchical resistances invoking academic freedom, meritocracy, or excellence to sidestep equality requirements (CS1, CS5, CS6, CS8, CS9, CS11, and CS12). Practical gender knowledge, by contrast, plays a central role in implementation, coordination, and accountability and is institutionally valued when aligned with bureaucratic logics or when it facilitates everyday organisational functioning (CS5, CS9, CS10, CS11, CS13, and CS14). Yet, this form of knowledge often lacks visibility and epistemic authority, limiting its capacity to influence broader institutional priorities.

Finally, several cases highlight the relevance of experiential and bottom-up knowledge rooted in the lived experiences of marginalised groups and in grassroots networks, such as student bodies or staff associations (CS4, CS6, CS7, CS9, CS11, CS12, CS13, and CS14). This knowledge contributes valuable insights into institutional barriers and support more grounded intersectional analyses. However, they are often incorporated only on an ad hoc basis, treated as inputs for awareness campaigns rather than as legitimate sources of expertise, or framed as "dangerous knowledge" (Bell et al. 2020) that is sidestepped unless translated into business-case rationales capable of securing institutional recognition (CS4). Overall, the cases show that the capacity of AGK to inform organisational processes depends less on its availability than on its institutional positioning, recognition, and authorisation.

Power, resistance, and the limits of Advanced Gender Knowledge

A central insight emerging from the case studies is that the hierarchical dynamics governing the relationship between knowledge and power within academic institutions are particularly pronounced in the context of gender equality initiatives, often limiting the effectiveness of gender knowledge. While gender experts frequently deploy their knowledge strategically—for instance, by forming alliances with senior leaders—their influence remains contingent on continuous advocacy for resources and institutional backing, revealing a weak and uneven linkage between expertise and authority (CS4, CS7). In some cases, requests articulated by gender practitioners are disregarded unless channelled through political or senior management offices, underscoring the vertical power structures that shape whose knowledge is taken seriously (CS4).

Epistemic authority emerges here as a key mediating factor between knowledge and power, enabling certain actors to influence institutional decision-making more effectively than others. The case studies indicate that senior gender experts holding formal institutional positions or strong academic credentials tend to command greater epistemic authority, earning the trust of top management and more readily advancing strategic change (CS3, CS4, and CS5). However, this authority is unevenly distributed and can be undermined by intersectional power hierarchies, limiting the influence of practitioners who lack formal recognition or institutional status (CS4 and CS9). Moreover, epistemic authority is not uniformly recognised across institutional actors: while academic staff and senior management tend to value seniority and theoretical expertise (CS4, CS5, CS10, and CS11), students respond more strongly to relational engagement and accessibility (CS4). Cases in which gender experts—whether academics or practitioners—enjoy broader institutional acceptance show greater effectiveness in advancing gender equality agendas and a relative weakening of neoliberal, business-oriented decision-making logics (CS1, CS2, CS3, CS5, CS7, CS10, and CS11).

At the same time, AGK is frequently contested rather than embraced. Resistance to gender knowledge production and mobilisation remains a persistent feature across cases and mirrors patterns identified in earlier research (see Lombardo and Mergaert 2013). Such resistance takes multiple forms, ranging from passive disengagement to active opposition, and is sustained through informal practices such as corporatism, endogamy, and exclusion (CS1, CS4, CS9, CS11, and CS14). It may target symbolic measures or directly confront gender experts themselves (CS3, CS4, CS7, CS8, and CS11), ultimately deprioritising gender equality and obstructing attempts to degender organisational logics. Empirically, this is evident when hierarchical seniority criteria override work-life balance measures (CS4 and CS5), when proposals to reform promotion and evaluation systems encounter opposition from those privileged by existing arrangements—often white male faculty

members (CS1, CS5, and CS8)—or when gender dimensions are resisted in curricula and research agendas (CS5 and CS11).

Lastly, the cases reveal a limited degree of reflexivity regarding privilege. Also, students and discriminated- or under-represented groups are seldom acknowledged as legitimate knowledge producers and are largely absent both from accounts of epistemic authority and from analyses of resistances. This absence points to a significant blind spot in institutional understandings of whose knowledge counts and highlights an unresolved tension at the core of efforts to operationalise AGK for structural change.

Conclusions: towards Advanced Gender Knowledge

The same way that knowledge is never a sole or sufficient condition for change (Lansu et al. 2019), the findings demonstrate that not all forms of knowledge are transformative in themselves. For gender knowledge to have a structural impact, it must be mobilised as AGK: that is, as a configuration that integrates feminist and intersectional perspectives, evidence-based and institutional know-how, and experiential and bottom-up insights and that is embedded in organisational decision-making processes. The case studies illustrate that when gender knowledge remains confined to awareness raising, symbolic commitments, or fragmented interventions, its capacity to challenge entrenched power relations is limited. By contrast, when knowledge is linked to institutional authority, embedded in formal processes, and used reflexively to question organisational logics, it becomes a lever for cultural and structural change. As Poggio (2022) observes, only when cultural frames are transformed can organisational practices begin to shift in meaningful ways. Unlike other facilitating factors—such as resources or leadership commitment, which may be disrupted by organisational or political shifts (Mergaert et al. 2022)—knowledge constitutes a form of intangible institutional capital that can persist over time and continue to inform practice.

From this perspective, the measure of success is not merely the presence of gender expertise but the extent to which systemic knowledge is produced and sustained through participatory and reflexive processes that engage feminist scholars, practitioners, and discriminated and/or under-represented groups. Such knowledge makes visible how gendered and intersectional inequalities are reproduced through academic norms, evaluation systems, and governance structures, while simultaneously generating analytical frames and practices capable of reorienting institutions away from neoliberal, colonial, and patriarchal logics. In doing so, AGK offers a critical foundation for more inclusive, just, and sustainable transformations within academia.

Distinguishing critical levels of Advanced Gender Knowledge

Based upon our discussion and the available empirical evidence across the 14 GEP impact case studies as well as our previous work (Müller et al. 2025),

we distinguish four critical levels of transformative potential of AGK with their corresponding indicators (see Table 5.4).

1 *AGK informs decision-making*: degree to which advanced gender equality becomes a substantive criterion in scientific and administrative decision-making, influencing how merit, excellence, and efficiency are defined and applied.
2 *AGK feeds GEPs' lifecycle (design, implementation, monitoring and evaluation):* extent to which the GEP is context-specific, covers Horizon Europe recommended areas, and integrates cutting-edge structural change measures grounded in intersectional social justice rationale.
3 *Mobilisation of AGK:* degree to which institutions provide sustained infrastructures and resources for the production, circulation, and institutional embedding of AGK.

Table 5.4 Four levels of calibration thresholds and their corresponding indicators and set-membership scores for 'Advanced Gender Knowledge'

Brief description	*Indicators*	*Set-score*
Transformative AGK	1 Evidence that inclusive gender equality criteria inform scientific and administrative decision-making (e.g., recruitment, promotion, funding), influencing definitions of merit/excellence or decision outcomes (e.g., evaluation frameworks, prioritisation, and tie-breaks). 2 Evidence of a context-specific GEP (e.g., participatory processes), covering Horizon Europe key areas and implementing a substantial proportion of measures addressing structural inequalities under explicit intersectional social justice frames. 3 Existence of sustained in-house gender knowledge infrastructures (e.g., gender research centres/ units with secured funding), alongside systematic availability and uptake of training for key stakeholders and mainstreaming of the gender dimension in research and curricula, supported by formal recognition mechanisms. 4 Regular mechanisms to incorporate diverse forms of knowledge, with gender experts and marginalised groups recognised as credible knowledge holders and included in advisory or decision-making processes, and epistemic justice reflected in policies and procedures. 5 Evidence that resistance to AGK is acknowledged and addressed through institutional strategies (e.g., reflexive spaces and leadership backing), with indications of learning or adaptation over time and feminist scholars reporting a sense of safety.	1.0

(*Continued*)

Table 5.4 (Continued)

Brief description	*Indicators*	*Set-score*
	1 Gender equality is explicitly discussed/documented as a consideration but insufficiently influences decision outcomes or overrides dominant merit- or excellence-based logics. 2 Horizon Europe key areas are formally included, but interventions are rather standardised, with limited structural measures or uneven implementation. Social justice and business-case frames coexist, with an additive (non-intersectional) approach and limited contextual tailoring (e.g., reliance on quantitative gender data). 3 A gender research centre or dedicated unit exists but is insufficiently resourced. Regular training is available but voluntary, not embedded in mainstream programmes nor targeting key decision-makers. Integration of the gender dimension in research and teaching is in progress but limited. 4 Diverse forms of knowledge are acknowledged through participatory processes but rarely inform critical decision-making. Gender scholars are symbolically recognised, yet their epistemic authority is inconsistently supported, and marginalised groups have low perceived legitimacy among leadership. 5 Cultural signals suggest that resistance can be expressed/discussed, but no effective institutional strategies are in place. Leadership engagement is limited, learning or adaptation is minimal, and feminist scholars report insufficient support.	0.67
	1 Scientific and administrative decisions are only superficially informed by gender equality or social justice concerns, with no documented evidence that such criteria influence outcomes. 2 Needs assessments are absent or weak. GEPs do not reflect state-of-the-art knowledge, fail to address all Horizon Europe key areas, and prioritise business-case narratives or awareness raising over structural or justice-oriented measures. 3 In-house gender knowledge is weak. Training is mainly outsourced, reaches few key actors, and is not complemented by sustained knowledge production. The gender dimension is largely absent from research and teaching, despite isolated initiatives. 4 Practical, experiential, and contextualised knowledge, particularly from women and marginalised groups, is not recognised as legitimate or relevant for decision-making. No consultation or participatory mechanisms are in place.	0.33

(*Continued*)

Table 5.4 (Continued)

Brief description	*Indicators*	*Set-score*
	5 Resistances to AGK are high and largely unacknowledged. Institutional responses are absent or limited to appeasement, and feminist scholars report exhaustion or burn-out.	
Epistemic exclusion regimes	1 Scientific and administrative logics remain unquestioned, with no evidence of epistemic shifts in how merit, excellence, or efficiency are understood. 2 No GEP exists, or it functions as a compliance exercise with isolated, ineffective interventions that reproduce conservative ideas and perpetuate inequalities. 3 There is no sustained in-house gender knowledge and no meaningful training, or existing initiatives are counter-productive. 4 Strong epistemic exclusion regimes persist. The knowledge and experiences of women and marginalised groups are ignored or actively devalued, reinforcing existing power hierarchies. 5 Gender knowledge production is actively resisted, feminist authority is undermined, and resistance cannot be safely expressed or addressed.	0.0

4 *Epistemic authority:* degree to which diverse feminist knowledges—including experiences of marginalised and discriminated groups—are authorised to influence decisions and recognised as legitimate, shaping the institutional learning and culture.
5 *Resistance to AGK:* degree to which institutions acknowledge, address and learn from resistances to AGK and feminist expertise, providing a safe environment for its creation.

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6 Communities of Change for inclusive gender equality

From theory to practice

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Introduction

In management and organisational studies, the main focus regarding people and change is on what are called change agents. A change agent is defined as any individual who takes on the responsibility of initiating and managing change within an organisation (Lunenburg 2010). In gender studies, change agents are the individuals who facilitate, promote, and implement organisational changes towards gender equality (Dahmen-Adkins and Peterson 2021). Research has shown that change agents are crucial in driving change within organisations towards gender equality and equality, diversity, and inclusion (EDI) (Barragan, Paludi, and Mills 2017; Callerstig 2014; Chaves Pérez and Benschop 2025; Cortis, Foley, and Williamson 2022; Dahmen-Adkins and Peterson 2021; Kelan and Wratil 2018; Li, Evans, and Bond 2023; Marvel 2018; Peterson 2014; Weick 2011). They are key in sustaining institutional change and the internal processes which are set in motion around gender equality efforts (Mergaert, Cacace, and Linková 2022). They can act as mentors and participate in gender equality interventions that enable other organisational members to question and modify gendered norms and work practices, thereby reducing systemic inequalities (Leenders, Bleijenbergh, and Van den Brink 2020). Research also shows that change agents are very diverse. They include diversity professionals, role models in male-dominated disciplines (Van Camp, Gilbert, and O'Brien 2019), equity leaders with formal or informal power (Li et al. 2023), and mentors who champion gender equality (Leenders et al. 2020), among others. They can be found across all major organisational (administrative and scientific) units and at different levels of hierarchy, including middle management, thus holding different opportunities to leverage power to effect change.

Moreover, research shows that the support of a network or an organised group of change agents significantly drives the push for institutional changes (Li, Evans, and Bond 2023; Thomson et al. 2022), even in contexts where there is a lack of top-management support (Bustelo 2023). Therefore, for structural change to happen, the task of gender equality cannot be assigned to EDI officers or gender experts alone; they need collective support. In some

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cases, change agents go beyond their own institutions to build alliances and seek support, especially in the face of strong internal backlash (Sekuła et al. 2022). Participation in external networks, living labs, and Communities of Practice (CoPs) can provide a valuable space to discuss gender inequalities and draw inspiration for their own initiatives. CoPs, particularly, have been shown to be very effective in helping to advance organisational change (Thomson et al. 2022). The CoPs put the concept of community as a necessary condition for change, linked to learning and practices (Palmén and Müller 2022).

This chapter builds on two premises: that change agents are central to institutional transformation and that the individualising logics of neoliberal governance must be countered by collective forms of action if change is to be sustained (Chaves Pérez and Benschop 2025; Gherardi 2009; Heijstra and Petursdottir 2022; Palmén and Müller 2022; Wroblewski and Palmén 2022). Our perspective is largely based on two previous studies. First, the findings from the TARGET project, which combined the formal adoption of Gender Equality Plans (GEPs) with the establishment of CoPs for gender equality within institutions (Wroblewski and Palmén 2022). In this project, CoPs played a key role by promoting internal dialogue, reflection, and collective learning, thereby strengthening both the adoption and sustainability of the GEPs and embedding gender equality more deeply into institutional cultures and practices (Wroblewski and Palmén 2022). Second, we adopt the term Communities of Change as proposed by Chaves Pérez and Benschop (2025). This concept derives from a literature review that identified different elements to promote effective and sustainable change for inclusive gender equality within academic institutions (Chaves Pérez and Benschop 2025). The Communities of Change propose that, besides being organised around a domain or expertise, change agents for equality need to be organised around feminist and decolonial values (Chaves Pérez and Benschop 2025). Inspired by these ideas, in this chapter, we explore how actors within research organisations can effectively organise to initiate and sustain intersectional gender equality. Based on the analysis of 14 academic institutions across Europe, we identify various configurations of change agents and assess which are the most effective in fostering change and challenging organisational cultural norms and values related to equality. In the following sections, we develop a theoretical framework, analyse the different change agents and the ways they work towards equality in research organisations and propose how to move from individual change agents to Communities of Change for inclusive gender equality.

Neoliberalism and individualism

Research consistently identifies neoliberal institutional logic, rooted in market-oriented principles, as a central barrier to advancing gender equality within universities (Brorsen Smidt et al. 2020; Chaves Pérez and Benschop 2025;

Crimmins, Casey, and McIntyre 2021; Heijstra and Petursdottir 2022; Mountz et al. 2015). This logic, embedded in discourses of excellence and meritocracy, often masks structural exclusion and discrimination by presenting the status quo as fair, rational, and deserved (Clarke, Hurst, and Tomlinson 2024). In doing so, it undermines critical efforts to question inequalities and implement transformative change (Booi, Vincent, and Liccardo 2017; Clarke et al. 2024; O'Connor and White 2021; Wijaya Mulya and Sakhiyya 2021). Moreover, it encourages individuals to attribute academic outcomes solely to personal skills and decisions.

The relentless productivity expectations of neoliberal university regimes place substantial pressure on individuals and foster isolation (Mountz et al. 2015). Individualisation, hence, becomes entrenched in organisational practices, shaping everyday routines, decision-making, and expectations within the organisation. Responsibility is shifted from the organisation to the individual (e.g., for career progression, workload, talent, or well-being). Structural issues—such as gendered hierarchies, biased evaluation criteria, or unequal access to opportunities—are reframed as individual challenges to be solved by individuals (van den Brink and Benschop 2012). In other words, individualisation is the mechanism through which neoliberal rationalities penetrate organisational life and is crucial for the internalisation of academic capitalism (O'Hagan et al. 2019). For instance, research shows that as women ascend the hierarchy, they may assimilate into the existing individualistic culture and become co-opted or less inclined to challenge the status quo (Cortis et al. 2022).

Neoliberal individualisation also shapes how gender equality work is delegated to a limited number of individuals, who must develop strategies to make the organisation more inclusive. Gender equality and inclusion are treated as individual tasks rather than collective institutional objectives. While feminist change agents are invaluable, their work—founded on principles of collaboration and solidarity—often incurs a considerable emotional and socio-political cost for them (Heijstra and Pétursdóttir 2022). Consequently, change agents frequently experience stress, pressure, and fatigue (Li, Evans, and Bond 2023; Thomson et al. 2022). This competitive individualism significantly limits their capacity to achieve structural transformation (Chaves Pérez and Benschop 2025; Heijstra and Petursdottir 2022). Without the engagement of a broader collective—including staff across hierarchical levels and students—these change agents often become overburdened, while entrenched institutional practices that sustain inequality remain largely unchallenged.

A community approach to change

There are different answers to the question of how to organise for equality. In higher education and research, a popular proposal is the CoPs. A CoP is most commonly defined as a group of people who share a concern, problem,

or domain of interest and who develop collective knowledge and competence through sustained interaction and participation in shared practices (Palmén and Müller 2022; Wroblewski and Palmén 2022). CoPs for gender equality should have three defining features: (1) domain, which focuses on increasing awareness and developing gender-related competences within the organisation; (2) community, which brings together relevant stakeholders who are interested in gender equality issues or who hold responsibilities in processes that are central to gender equality; and (3) practice, which involves exploring alternative ways of doing things, either in opposition to or alongside existing organisational routines (Palmén and Müller 2022; Wroblewski and Palmén 2022). These three features must be combined for effective change. However, some authors question whether CoPs, despite their normative appeal to 'community' can foster collective and political forms of action, particularly when they are reified or appropriated as managerial tools (Contu and Willmott 2003; Gherardi 2009). Recent research shows that CoPs do not automatically generate institutional commitment. Their impact depends on a favourable structural context (Mihajović Trbovc 2022); they often struggle with internal power dynamics (Sekuła et al. 2022; Thomson, Barnard, et al. 2022); they may also lack the in-house knowledge needed to advance change (Reidl et al. 2019) (see Chapter 5); and they often rely on unpaid labour. All of this undermines their capacity for long-term institutional change. For this reason, the TARGET project conceptualised CoPs primarily as spaces for reflexivity and mutual learning embedded within the GEP cycle, rather than as standalone interventions directly reshaping institutional structures. Within this framework, structural change was expected to be driven through the GEP itself, supported by the reflexive processes facilitated within the CoPs (Wroblewski and Palmén 2022).

Some authors suggest that CoPs may evolve into Communities of Political Practice (CoPPs), understood as counter-hegemonic collectives of institutionally affiliated actors who collaborate across organisations around gender equality, enact alternative practices, build collective identity, and co-produce knowledge for institutional transformation (Thomson, Barnard, et al. 2022). We align with this perspective, particularly in recognising their potential to challenge the political dynamics that sustain resistance to change. Both concepts—CoPPs and Communities of Change—address the need to approach change as a political rather than purely a learning process. However, while CoPPs often emerge across organisational boundaries, Communities of Change are conceived as institutionally embedded collectives that foreground an explicit commitment to political transformation while sustaining and structuring change from within. Drawing on a literature review showing that feminist change agents organised collectively constitute a particularly promising configuration for producing sustainable, equality-oriented change (Chaves Pérez and Benschop 2025), Communities of Change refer to groups oriented towards structural collective transformation. In opposition to neoliberal values that promote competition and individual career progression

and success, feminist change agents ought to organise in communities around principles such as solidarity, care, and epistemic inclusion (Gray, Knight, and Blaise 2018; Haynes et al. 2020; Johansson et al. 2024; Neal-Barnett et al. 2011; Szymanski and Lewis 2016). This perspective also highlights the transformative role of positive relational affects—such as joy, friendship, and pleasure—in sustaining change efforts (Johansson et al. 2024).

The idea of Communities of Change has been used in non-academic contexts—particularly in development settings—to describe community-driven initiatives, mostly grounded in grassroots organising or established through strategic collaborations. Moreover, the notion of change led by communities has long been central to participatory approaches across a range of sectors globally, which focus on the community dimension (community-based agency), including climate action and rural development (Albertyn et al. 2023; Alcorn 2005; Anderson and Cidro 2020; Apgar et al. 2017; Bennett et al. 2016; Fals-Borda 1987). In this sense, Communities of Change build on broader democratic traditions that conceptualise collective agency as explicitly political and oriented towards confronting structural inequalities. It conceptualises community from a feminist perspective that understands collective action as situated within relations of power (Acker 2006) rather than as a neutral or harmonious social form. Hence, the community is not an inherently emancipatory space; it needs continuous political commitment and shared practices (Gherardi 2009). Community is not defined by cohesion or consensus but by political alignment, explicitly embracing conflict as a constitutive dimension of democracy and social change (Laclau and Mouffe 2001; Mouffe 2006). Members, therefore, join together not because of a topic, but because of a normative commitment to transformation, justice, and redistribution (Fraser 2014; Hooks 1988). In doing so, members explicitly acknowledge the politics of their project and seek to strategise collectively within and against inequality regimes. In this way, typical change agents for equality, such as EDI officers, gender scholars, and specialists in other fields of inequality, organise together and also mobilise other players across the organisation to support equality and challenge inequality in organisational culture (Chaves Pérez and Benschop 2025). In a Community of Change, the sustainability and effectiveness of gender equality efforts are enhanced by cultivating solidarity across institutional levels (Fusulier, Barbier, and Dubois-Shaik 2017; Glass, Cook, and Pierce 2020) and care for those engaged in related struggles (Jaquetto Pereira 2025). This also helps to prevent the burden of change from falling on a single individual or a small group, while creating possibilities for redistributing responsibility for equality across the organisation.

We argue that feminist community–led approaches, here called Communities of Change, offer a pathway to sustaining progress under neoliberal conditions, particularly where advances in gender equality remain fragile or at risk of reversal. Communities of Change provide a normative framework that shifts the focus to the political, relational, and affective dimensions of

change, elements often overlooked in other approaches. This perspective foregrounds grassroots efforts to transform academic cultures from within, emphasising crucial aspects of organisational change encompassing internal organisational culture and norms (Chaves Pérez and Benschop 2025). From this conceptualisation, sustainability involves creating conditions where individuals can engage in meaningful collective work while feeling recognised, respected, and safe (Barry and Đorđević 2007).

In this chapter, we examine different configurations of change agents across different case studies, analysing the implications of various constellations and the possible Communities of Change that emerge. Indicators are then created to better understand what makes these communities effective and transformative through the analysis of relevant aspects such as key actors (individuals and collectives); their level of commitment to change; their possible sources of power; whether there is a community (people organised around shared values) or a network (people organised around shared goals) whose activities derive from their work; and how they relate to the centres of power in the organisation and navigate resistance to inclusive gender equality.

Methodology

Our analysis draws upon empirical data from 14 GEP impact case studies conducted across various European academic institutions. A coding framework was developed based on preliminary findings. Inductive codes were created during the process, and frequent discussions among the authors enabled adjustments. The final coding scheme served to identify change agents and to explore how they organise collectively, either formally or informally, to produce change. Atlas.ti software was utilised to code the documents. Subsequently, the case studies were compared, and distinct actor configurations were identified.

Each case study (CS) was first analysed independently to identify the actors involved in the design and implementation of gender equality and EDI policies. Subsequently, their roles were characterised, and their commitment to change was assessed. Commitment to change represents an essential distinction between key actors in a formal position of power and change agents. Once we had identified the key actors and change agents, we mapped their level of power in the organisation. This allowed for a visual analysis of the configurations and enabled comparisons between cases. We examined how collective actors emerged and how visible collaborations between change agents contributed to institutional change efforts. Particular attention was paid to how these collaborations influenced the design, implementation, and long-term sustainability of gender equality and EDI initiatives, as well as to how change agents use their positions within organisations to confront and reshape power structures and dynamics and to work collectively to sustain change. The main results from this analysis are summarised hereafter.

Reconfiguring change: current change agents and collective configurations

Change agents and their source of power

Change agents were identified based on two criteria: a clear commitment to advancing inclusive gender equality and at least one source of power. We started our analysis by describing the change agents we identified through the case studies, along with their sources of power or their influence. We consider that power can derive from many sources, such as institutional position and the capacity to influence decision-making, either formal (key position, networks, participation in committees or councils) or informal (skills and competencies, status and reputation, epistemic authority and institutional knowledge) (see Chapter 5). The influence of the change agent refers to their capacity to shape institutional outcomes and can be understood as a relational expression of power.

EDI officers, including gender equality officers, are present in all case studies, but their institutional positioning within university governance structures varies considerably (see Chapter 3). In seven institutions, gender equality and EDI roles are located at the executive or vice-rector level, providing direct strategic access (CS1, CS4, CS5, CS11, CS12, CS13, and CS14). In four cases, EDI officers are located within central administration or leadership offices, maintaining proximity to decision-making but without full executive authority (CS6, CS8, CS9, and CS10). Only one case places the EDI officer within Human Resources (HR), where the role is primarily advisory and focused on monitoring (CS7). Beyond formal positioning, equality officers draw on additional sources of influence, such as EU-funded projects (CS6, CS7, CS10, CS11, CS12, and CS13), which provide access to networks and, in some cases, independent resources. Influence is also associated with long institutional trajectories (CS5 and CS8) and with the combination of organisational embeddedness and epistemic authority (CS1, CS3, CS9, CS10, and CS14). This influence is evident across multiple domains, including embedding equality in institutional strategies (CS8 and CS13), shaping recruitment and promotion practices (CS3 and CS7), supporting faculties through participatory approaches (CS9 and CS11), and ensuring continuity through institutional memory (CS1, CS5, and CS6). Across all cases, proximity to centres of power consistently shapes the scope of EDI action in terms of access to decision-makers, control over resources, and recognition of authority. Overall, this positioning within the governance framework affects both the power of EDI officers and the legitimacy of their work (see Chapter 3).

Feminist and gender scholar-activists emerge as key agents of change, driving equality work and sustaining action across cases. Their influence is different in different cases and operates at institutional and even national levels; they were central to the creation of the first GEPs through gender-based violence (GBV)-related demands (CS6), played a decisive role in establishing

equality committees and governance structures (CS8, CS9, CS10, and CS11), and maintained momentum despite scarce or unstable resources (CS6, CS7, CS8, CS9, and CS11). In some cases, they reached senior management positions, where their deep knowledge of gender and EDI informed institutional agendas (CS6, CS8, and CS9), while in others they contributed to legislative change at the national level (CS5). Frequently, they acted as boundary actors, mobilising EU project funding and translating policy, research, and teaching on gender, race, sexuality, and disability into institutional EDI practices, often in collaboration with EDI officers (CS6, CS7, CS10, CS11, CS12, and CS13). In some cases, the presence of these experts provided a recognised knowledge base that informed equality committees and policy design (CS10 and CS14). Despite these contributions, equality work largely relied on their voluntary and often feminised academic labour, generating risks of burnout and career costs (CS4, CS5, CS6, CS7, and CS11). Their formal decision-making power generally remained mid to low (CS6, CS7, CS11, CS12, and CS13), with rare exceptions such as a vice-rector position (CS8). Nevertheless, they were widely recognised as experts with epistemic authority, which proved crucial for legitimising equality agendas and persuading senior academics and managers to engage with EDI practices.

Top leaders and managers play both symbolic and structural roles in legitimising equality. Symbolically, their endorsement signals organisational priority and shapes internal and external narratives (see Chapter 3). Substantively, commitment materialises through embedding equality in executive governance, strategic agendas, and resource allocation. Such institutionalised engagement is evident where equality portfolios are formally tied to senior leadership roles (CS10, CS12, and CS13) and where leaders recognise the epistemic authority of EDI officers and experts, enabling sustained collaboration (CS9, CS10, and CS11). By contrast, leadership turnover or weak institutionalisation exposes the fragility of personalised support (CS6). Across several cases, leadership commitment is framed instrumentally in terms of funding or reputation (CS2, CS7, CS9, and CS10). In other cases, leadership neither actively promoted nor obstructed equality work; change appears to have advanced largely independently of leaders through routines, compliance mechanisms, or external mandates (CS1, CS3, CS5, and CS14).

Middle managers: Deans, vice-deans, heads of department, professors, and chairholders—occupy a critical yet ambivalent position in equality work. Positioned between central leadership and everyday academic practice, they translate institutional strategies into decisions on hiring, workload, evaluation, and resource allocation. Six cases show that when supportive, middle managers are key drivers of change, mobilising resources, legitimising equality agendas, and embedding EDI in daily practices (CS2, CS4, CS7, CS9, CS13, and CS14). At least three cases demonstrate that when middle managers disengage or resist, their autonomy and gatekeeping roles can cause bottlenecks and uneven implementation (CS6, CS7, and CS12). Both dynamics often coexist within the same institution, underscoring the complexity of

their role. Middle managers therefore function not merely as policy implementers but as critical sense-makers whose values and knowledge shape outcomes. However, in more technocratic or project-driven settings, middle managers have a limited role in promoting equality, as this issue is formalised through HR logics and external funding requirements (CS1, CS3, CS5, CS10, and CS11).

It is not only women: Men play a significant role in equality work across the cases, both through formal participation and as individual allies. In several institutions, men are active members of equality committees and councils, contributing to policy design, monitoring, and implementation (CS6, CS1, CS12, CS13, and CS14). In one case, an intersectional focus on race and decolonisation drew men into equality work beyond gender, particularly through student activism (CS7). In three cases, men in positions of power—such as directors, vice-directors, and senior professors—acted as influential allies, mobilising institutional authority and networks to support structural change (CS6, CS8, and CS13). In one of these cases, a white male EDI officer reported being perceived as more legitimate, as his engagement was understood to be based on organisational commitment rather than self-interest. This example shows that, overall, men's engagement contributes to perceiving equality as a collective responsibility rather than a specific group agenda.

Collective configurations

Groups of equality officers or equivalent roles located at the faculty level were found in six cases (CS2, CS3, CS5, CS9, CS11, and CS14). In these cases, they function as local translators and implementers of GEP and EDI strategies and are organised in different ways: some professors are formally appointed as faculty gender equality officers with allocated teaching release (CS2); faculty representatives act as local contact points for staff and students, channel faculty-level concerns to the central gender equality office, and form a collaborative community that meets regularly to support and coordinate implementation (CS9); mandatory equality liaisons link each faculty to the central equality unit through faculty management teams (CS5); and faculty liaisons primarily focus on communication, while strategic planning remains centralised (CS14). Across cases, the legitimacy of faculty-based actors also rests on epistemic authority and institutional knowledge. More commonly, however, inclusion-related tasks at the faculty level are assigned to HR or administrative staff for whom EDI activities constitute only part of a broader portfolio.

Equality committees, councils, or equivalents are present in most institutions except in one (CS7), but their mandates differ. Some oversee and monitor GEPs (CS4 and CS5), others act as advisory or supervisory bodies (CS1, CS6, and CS13), provide complementary support (CS4, CS9, and CS10), or offer specialised professional expertise, particularly on GBV (CS8, CS9, and CS10). They influence recruitment and appointment processes in

some cases (CS3), while in others they coexist with bottom-up scholarly networks, creating hybrid governance arrangements (CS11). Some bodies address discrimination across multiple axes (CS4, CS8, and CS12). Representation varies from inclusion of broad staff–student (CS1, CS6, and CS14) to more academic configurations (CS8 and CS13). In practice, most of these bodies struggle to create and sustain change. Members reported limited time and resources, restricted authority, weak implementation infrastructure, and varying degrees of resistance. Many relied on voluntary labour, and in several institutions, committees were established as formal policy responses, but with unclear mandates and limited support.

Feminist and decolonial bottom-up collective action takes diverse forms across the cases. Student-led mobilisations achieved tangible outcomes, such as improving campus safety (CS4), access to free menstrual products (CS8), and promoting institutional responses to racism and decolonisation (CS7). Staff, PhD, and faculty networks have raised concerns about discrimination and racism in everyday practices, fostering local ownership and sustained engagement (CS7 and CS12). Scholarly activism has also been central to institutionalising equality structures, particularly where gender scholars initiated networks that later became formalised within governance arrangements (CS6, CS8, and CS11). Project-based initiatives, often linked to EU funding, enabled research teams to pilot equality measures and translate experimental practices into institutional policies, especially where project infrastructures provided resources, legitimacy, and transnational networks (CS10 and CS11; to a lesser extent CS6, CS12, and CS13). In some cases, feminist and decolonial actors strategically leveraged these frameworks to institutionalise agendas rooted in activism and critical scholarship. For instance, a PhD student mobilisation around decolonisation evolved into a formal institutional project (CS7), while scholar-led networks became embedded in governance structures through project support (CS11). Faculty academics further translated grassroots concerns into recruitment and appointment practices (CS3), and, in some cases, grassroots action was sustained through formal recognition mechanisms and participatory routines (CS5, CS14). Across cases, these bottom-up initiatives expanded equality agendas and sometimes became institutionalised. However, many were contingent on crisis moments, temporary funding, voluntary labour, or specific leadership support, raising questions about their long-term sustainability.

How to move from change agents to Communities of Change

Several types of individual change agents were identified, with different sources of power and strategies to influence equality agendas. The cases show that gender, feminist, and decolonial scholars and activists act as critical change agents in multiple ways. The clearest mechanism is when an inequality expert attains a high institutional position, thereby combining several sources of power. As recognised experts in inequality, they possess

disciplinary legitimacy and symbolic capital within the academic field, which lends them epistemic authority (see Chapter 5). They are often embedded in formal and informal equality-related structures, thereby extending their institutional reach and legitimacy. The cases show that when they reach positions such as deans or vice-rectors, they bridge top leadership and staff, reframe equality as a structural issue, and embed feminist values within governance. Moreover, their credibility fosters trust, supports EDI officers, and attracts broader participation, functioning as catalytic nodes. This confirms previous studies on gendered power in academia, showing how symbolic capital and informal networks shape advancement and that epistemic authority alone rarely translates into structural change without positional power (van den Brink and Benschop 2012).

The cases also indicate that the engagement of structurally privileged actors—often senior, white male academics—who occupy high-status positions within the academic hierarchy is important, as they hold significant academic capital and symbolic authority (Bourdieu 1986). Their endorsement can legitimise equality agendas, reduce peer resistance, and translate demands into mainstream organisational practice. However, focusing only on top leadership risks privileging a top-down model of change. Moreover, research on gender and leadership in higher education shows that senior management commitment is often uneven or symbolic, and elites frequently reproduce existing hierarchies despite formal commitment to equality agendas (Morley 2014; O'Connor 2020; O'Connor and White 2021). In several cases, senior leaders did not prioritise equality, framed it as non-essential, or treated it as symbolic compliance. These dynamics indicate that structural transformation cannot rely solely on elite endorsement but requires collective and multi-directional forms of action.

Beyond individual change agents, formal structures such as gender equality or EDI committees, councils, and faculty-based equality officers can provide an institutional foundation for Communities of Change. By linking senior leadership, middle management, and staff, these collaborative arrangements expand the scope of equality work across organisational levels. However, the findings indicate that formalisation alone does not guarantee transformative capacity. Their influence remains contingent on mandate clarity, access to resources, decision-making authority, and inclusive practices that enable meaningful participation in agenda-setting and governance. Sustainability also emerges as a persistent challenge, because equality work is frequently undertaken on a voluntary basis or added to already overloaded academic roles. Embedding equality responsibilities within formal workload models, career progression criteria, and compensation structures is therefore central to strengthening institutional commitment and preventing burnout.

Bottom-up initiatives and collective action often emerge from marginalised groups seeking to challenge exclusion and reshape institutional priorities. These initiatives create alternative spaces for collective problem ownership, expand the scope of equality work and enable those most affected by

inequality to influence agendas and contest dominant organisational logics. Rooted in feminist values, these spaces contribute to strengthening inclusion and enhancing coordination by connecting dispersed actors and circulating situated knowledge. At the same time, they remain vulnerable to internal tensions, uneven participation, and burnout, and their continuity is often contingent on broader institutional dynamics. For instance, student-led activism may be episodic in nature, but staff involvement can sustain a latent infrastructure for renewed mobilisation. The cases show that when linked to formal governance, such grassroots efforts can reshape norms and redistribute influence. Finally, actors who move between informal feminist spaces and institutional structures can play a crucial bridging role, aligning bureaucratic processes with transformative commitments.

Distinguishing critical levels of Communities of Change

To operationalise Communities of Change, the cases indicate that equality advances when feminist grassroots initiatives and institutional actors are connected in ways that align agendas across levels, redistribute responsibility, and translate collective demands into institutional practice. These dynamics can be articulated through four interrelated dimensions across four levels, which are further specified through indicators as shown in Table 6.1.

1 *Scope and reach:* Equality work becomes more effective when responsibility extends beyond specialised units and is shared across organisational levels. This dimension refers to the extent to which diverse actors—senior leadership, middle managers, feminist and decolonial scholars, marginalised groups, EDI officers, faculty actors, and structurally privileged academics—assume collective problem ownership.
2 *Coordination:* Coordination refers to the alignment of equality efforts across actors and institutional levels and involves clear mandates, defined roles, and communication channels linking central equality structures with faculty implementation and grassroots initiatives. Effective coordination balances central authority with decentralised action, reducing fragmentation while allowing flexibility for bottom-up engagement.
3 *Inclusion:* Inclusion goes beyond consultation and involves meaningful participation in which marginalised groups influence priorities and challenge inequality structures. It requires conditions that enable safe and valued participation in decision-making, alongside active engagement by privileged groups in dismantling the structures that reproduce inequality.
4 *Sustainability:* Equality work must be organised in ways that are manageable, valued, and formally recognised across staff categories. Embedding equality tasks in career progression and compensation schemes helps prevent burnout and supports long-term institutional commitment.

Table 6.1 The four conceptual dimensions of Communities of Change for inclusive gender equality (scope, coordination, inclusion, and sustainability) with their corresponding four levels of calibration thresholds as defined by the described indicators and set-membership scores

Scope of community	*Effective coordination*	*Inclusive process*	*Sustainability*	*Set-score*
Community members represent all organisational levels. Senior academics and leadership are visibly engaged. Gender equality (GE)/EDI work is recognised as a shared responsibility across research, education, and administration.	Coordination is strategic and reflexive, aligning equality values with organisational culture. Roles and responsibilities are complementary; learning, accountability, and dialogue connect all levels.	Inclusion goes beyond consultation. Real participatory processes allow marginalised voices to influence priorities and challenge inequality. Women and minoritised groups feel safe and valued, while privileged groups actively foster structural change.	Equality work is institutionally valued and resourced through workload models, compensation, or promotion criteria. GE/EDI responsibilities rotate; participation is embedded in governance and career systems, ensuring continuity beyond individuals or projects. Feminist values promoted by grassroots collectives guide policies and actions.	1.0
Broader participation across hierarchies: equality officers, middle managers, senior academics, admin staff, and students begin to collaborate. Problem ownership starts to expand.	Regular coordination mechanisms link departments and central offices. Equality officers act as facilitators and knowledge brokers. Bottom-up initiatives begin to inform institutional processes.	Efforts to include minoritised and marginalised groups in decision-making spaces. Some attention to intersectionality and relational dynamics.	Equality work receives some formal recognition but limited resource allocation. Senior men and other privileged groups begin to share responsibility. Values such as solidarity and care are mentioned.	0.67

(*Continued*)

Table 6.1 (Continued)

Scope of community	*Effective coordination*	*Inclusive process*	*Sustainability*	*Set-score*
A small network or committee exists, but participation is uneven. Senior academics and middle managers remain detached, only evaluating GE/EDI efforts, not collaborating.	Some coordination led by equality officers, mainly administrative or compliance-oriented. Limited communication between central and local organisational units.	Diversity is mentioned, but intersectional perspectives rarely shape priorities or decisions. A few marginalised people are involved.	Some short-term funding or project support exists, but equality work remains peripheral to career structures. Some people are committed to change but are not supported by a community or recognised properly. No change in values.	0.33
GE/EDI work is confined to a few, often isolated individuals (e.g., committed women scholars or EDI/GE officers). No critical mass or cross-level engagement.	No coordination across units such as departments. Activities are ad hoc or project-based. Efforts remain siloed.	Participation is homogeneous (mostly women or equality experts). Marginalised voices are absent or tokenised.	GE/EDI work relies on voluntary labour, with no resources, recognition, or workload adjustments. Risk of burnout is high. Neoliberal values that promote competition and individualisation guide policies and actions.	0.0

Conclusions

As a normative and analytical framework, Communities of Change specify the relational and structural conditions under which collective actors can advance equality. Effective Communities of Change connect actors across hierarchical and positional differences—linking leadership, middle management, academic staff, and grassroots initiatives—to reduce fragmentation, align institutional strategies with local realities, and embed shared responsibility for equality. Sustainability extends beyond resources or formal mandates; it also depends on the emotional and relational conditions that enable long-term engagement in equality work. Practices that cultivate care, solidarity, mutual recognition, and collective joy strengthen resilience and commitment, particularly in contexts marked by resistance or hostility. Communities of Change therefore endure not only through institutional structures and formal authority but also through relationships that sustain transformative action over time.

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7 Enforceable Legislation

Marta Warat

Introduction

Over the past three decades, the European Union has developed an increasingly elaborate policy architecture to advance gender equality within research and innovation systems (Caprile et al. 2012; Lipinsky 2014). Legal and regulatory frameworks have expanded in scope and ambition, funding programmes have been redesigned to embed equality requirements, and, most recently, gender equality plans (GEPs) have been introduced as an eligibility criterion for participation in Horizon Europe. Yet the structural inequalities that these instruments seek to address persist. Women remain underrepresented in science, technology, engineering, and mathematics (STEM) fields; in senior academic positions; and in research leadership across European higher education institutions (HEIs) and research-performing organisations (RPOs), as the most recent She Figures report (2024) confirms. This disjuncture between the proliferation of policy frameworks and the durability of gendered hierarchies poses a fundamental analytical question: under what conditions can legislation and regulatory instruments move beyond procedural or symbolic function to reshape the institutional logics through which gender inequalities are reproduced?

The question is not new, but its salience has intensified as the orientation of European gender equality policy has shifted significantly. Where earlier frameworks, developed from the 1990s onwards, focused primarily on supporting individual women scientists, more recent policy has moved towards institutional and structural approaches that seek to address the organisational conditions and cultures through which inequalities are sustained (Lipinsky 2014; Palmén and Kalpazidou Schmidt 2019; Wroblewski and Palmén 2022). This reorientation, widely characterised as a shift from 'fixing the women' to 'fixing the institutions,' reflects a broader conceptual convergence between gender mainstreaming strategies, feminist institutionalist analysis, and the recognition that formal equality among individuals is insufficient to dismantle structural barriers to participation and progression (Clavero and Galligan 2020; Mackay, Kenny and Chappell 2010). As Anagnostou (2022) argues, this policy reorientation has developed in tandem with

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the increasing resonance of substantive equality concepts in the legal domain, signalling a move beyond formal, individual-centred understandings of non-discrimination towards more systemic and transformative legal frameworks.

A pivotal juncture in this trajectory was the European Commission's explicit framing, in its 2012 communication on the European Research Area (ERA), of gender equality as a precondition for research excellence—a repositioning of gender equality from a social justice obligation to a condition of epistemic quality and institutional competitiveness (EC 2012, cf. Palmén et al. 2017). This framing was subsequently embedded in official EU strategy, with gender equality designated as one of five ERA priority areas and expectations placed upon national authorities to develop legal measures enabling women's progression in research, their access to decision-making, and the integration of the gender dimension into research content and design (EC 2012). The introduction of GEPs as a mandatory eligibility criterion for Horizon Europe participation in 2021 represented the most far-reaching institutional formalisation of this commitment to date, requiring HEIs and RPOs across Europe to adopt structured approaches to gender equality as a condition of access to research funding (EC 2021).

The influence of legal frameworks on GEP implementation operates, however, on two interconnected but analytically distinct levels. The first concerns the capacity of legislation to establish binding rules that prohibit discriminatory practices and secure minimum standards of equal treatment. The second concerns the potential of law to promote proactive institutional change through positive duties, incentive structures, and the cultivation of broader cultural shifts within organisations (Caprile et al. 2012:169). While the former has been relatively well established at both EU and national levels, more targeted measures addressing, for instance, the gender pay gap in academia or the underrepresentation of women in decision-making bodies vary considerably across national contexts. In some countries, equality provisions extend across all sectors; in others, they are tailored specifically to higher education and research. Policy instruments differ accordingly: Nordic and some Southern European countries have introduced quotas for committees, research councils, and selection panels, while others have focused on establishing designated institutional gender equality positions (Caprile et al. 2012:169–70).

This variation reveals a persistent structural tension at the heart of equality legislation in higher education: between legal frameworks as vehicles of transformative institutional change and their appropriation as managerial or symbolic instruments that generate procedural compliance while leaving underlying gendered hierarchies intact. A growing body of scholarship has drawn attention to the risk that GEPs, in particular, may function as performative documents—institutionally visible but substantively inert—unless accompanied by the political will, resources, and enforcement mechanisms necessary to translate formal commitments into embedded organisational practice (Palmén and Kalpazidou Schmidt 2019). The challenge, as this

chapter argues, lies in specifying the conditions under which legislation and policy instruments can exceed their symbolic and procedural functions and generate meaningful, sustained institutional change.

This chapter examines the role of national and European legislation and certification schemes in shaping the implementation of GEPs, drawing on 14 GEP impact case studies of the INSPIRE project. The analysis develops an argument about the conditions under which legal frameworks can exercise substantive influence on institutional practice. It demonstrates that legislation alone is insufficient: to be effective, legal and regulatory frameworks must be accompanied by three interrelated enabling conditions: dedicated resources for implementation, compliance mechanisms tied to clear quality standards, and credible sanctions for non-compliance. This chapter traces these conditions across the case studies, identifying three distinct institutional trajectories—progressive, procedural, and fragmented—that correspond to different configurations of regulatory design, institutional capacity, and political commitment. It concludes by considering the broader implications of these findings for the design of gender equality legislation and policy in European higher education.

EU policy frameworks, legislation, and certification schemes: shaping the gender equality agenda in academia

Existing scholarship consistently identifies EU policy and legislation as central drivers shaping the development and implementation of GEPs in HEIs and RPOs (Addabbo et al. 2021; Linková et al. 2023). Yet EU interventions operate less as direct regulatory requirements than as institutional arrangements that define minimum standards and shape incentive structures. Understanding this dual character—at once normative and instrumental, binding and voluntary—is essential for assessing whether EU legal frameworks and certification schemes can generate substantive, rather than merely procedural, institutional change. This section traces the development of EU gender equality policy from its foundational legal commitments through to the introduction of GEP eligibility criteria under Horizon Europe, before examining the complementary role of certification schemes and the mediating function of national legislative frameworks.

From formal equality to governance by incentives

Gender equality has been embedded in the EU's legal foundations since the Amsterdam Treaty (1997), which established gender mainstreaming as a horizontal principle across policy domains. Rather than constituting a discrete regulatory field, gender mainstreaming promotes the systematic inclusion of gender perspectives in policymaking through action programmes, institutional mechanisms, and monitoring instruments (Bencivenga and Drew 2021). Subsequent directives—particularly in employment and work–life balance—have

been transposed into national legal systems, mandating member states to address gender-based discrimination and secure minimum standards of equal treatment. The European Commission's successive Gender Equality Strategies, most recently for the period 2020–2025, have reinforced these commitments by strengthening expectations around accountability, intersectionality, and the prevention of gender-based violence. While these regulations are not directed specifically at HEIs, they shape institutional practices by providing a shared normative reference framework for public bodies and employers.

The literature consistently documents, however, that compliance with EU equality regulations remains uneven and highly contingent on national political will, institutional cultures, and socio-political climate (EC 2009). This variability reflects a broader structural feature of EU gender equality governance: the progressive shift from legal harmonisation towards governance through incentives, benchmarking, and reputational mechanisms, in which member states and institutions are encouraged towards compliance rather than compelled into it.

From excellence rhetoric to eligibility requirements: gender equality in EU research policy

The European Commission has gradually constituted research and innovation as a priority domain for gender equality intervention. Persistent inequalities in academic careers, leadership, and knowledge production have been reframed not only as social injustices but also as structural obstacles to scientific excellence—repositioning gender equality as a condition of research quality rather than a peripheral concern. From the Sixth Framework Programme onwards, measures explicitly aimed at structural change have included Gender Action Plans, gender-disaggregated indicators, and institutional support mechanisms (EC 2012). These interventions reflected, and helped consolidate, the broader conceptual shift from 'fixing the women' to 'fixing the institutions' that has characterised European gender equality policy since the early 2000s (Wroblewski and Palmén 2022). As mentioned in the introduction, there are currently three main ways that the Commission tackles structural inequalities in research and innovation:

- ERA in collaboration with member states.
- Framework Programmes for Research and Innovation (including Horizon 2020 and Horizon Europe).
- She Figures—data gathering and analysis over time.

The ERA has reinforced gender equality as a cross-cutting priority since 2012, linking it to research quality, career development, and institutional decision-making. These priorities have been translated into national ERA Action Plans, with GEPs positioned as a key instrument for institutional transformation. Yet the persistence of inequalities—particularly at

senior academic levels and at the intersections of gender with other axes of disadvantage—highlighted the shortcomings of the gender mainstreaming approach while underscoring the need for stronger coordination, evaluation, and targeted measures against gender-based violence in academic settings.

This trajectory intensified under the Horizon 2020 and Horizon Europe Framework Programmes, whereby the most consequential development was the introduction of GEPs as an eligibility criterion for Horizon Europe participation for public bodies, such as research funding bodies, HEIs and research organisations, both public and private (see Chapter 1 for more information on recommended content-related requirements and mandatory process-related requirements). This requirement has functioned as a powerful normalising instrument, institutionalising GEPs as a standard policy measure and fostering transnational communities of practice (Linková et al. 2023). At the same time, the GEP eligibility criterion specifies neither outcomes nor evaluation frameworks. Scholars argue that this absence of explicit success criteria undermines accountability and limits the capacity to assess whether GEPs generate substantive organisational change or merely formalised compliance (Brescianini, Bannò, and Federici 2024). Without clear benchmarks, implementation risks becoming a bureaucratic exercise concerned with document production rather than the redistribution of power, resources, and recognition within academic institutions.

Certification schemes as quasi-regulatory mechanisms

Alongside EU funding programmes, certification and award-based schemes have emerged as significant drivers of institutional change, operating as quasi-regulatory mechanisms that translate normative commitments into structured processes of self-assessment, action planning, and periodic review (Addabbo et al. 2021). The Athena SWAN Charter has been the most consequential of these instruments. Its expansion beyond STEMM disciplines and its linkage to research funding eligibility in the United Kingdom and Ireland transformed it from a voluntary recognition scheme into a substantive compliance mechanism with demonstrable effects on institutional cultures and career support structures (Kalpazidou Schmidt et al. 2020). Evidence indicates that Athena SWAN has contributed to increased institutional reflexivity, improved organisational culture, and enhanced support for women's careers by embedding monitoring, accountability, and evaluation requirements into institutional governance (Ovseiko et al. 2017, 2019).

At the same time, the literature documents a set of significant unintended consequences: the overburdening of women with equality-related work, perceptions of bureaucratic excess, the privileging of gender over other axes of inequality, and a limited capacity to address persistent power and pay imbalances (Munir et al. 2013; Ovseiko et al. 2020). These critiques point to a structural tension within certification schemes more broadly: their effectiveness as accountability mechanisms may co-exist with their operation as

instruments of symbolic performance, in which accreditation becomes an organisational end in itself.

The HR Excellence in Research Award operates through a related but distinct logic, situating gender equality within broader discourses of research excellence and talent management. This voluntary initiative obliges institutions to implement policies supporting researchers' career and professional development in line with the principles of the European Charter for Researchers, with particular attention to GEPs that promote cultures of diversity and inclusion, equitable recruitment and career development, and work–life balance in governance bodies. While it confers reputational benefits, its voluntary nature and emphasis on procedural alignment rather than outcome-oriented accountability raise concerns about symbolic compliance, particularly where gender equality lacks strong legal or political support.

Between law on paper and law in practice. National frameworks as mediating structures

While EU-level frameworks provide important incentives for adopting GEPs, their effectiveness is critically mediated by national legal and policy environments. National frameworks do not merely translate EU norms into domestic law; they actively shape the conditions under which GEPs are interpreted, resourced, and enforced (Bencivenga and Drew 2021). Comparative research has mapped European countries according to the advancement and coherence of their gender equality legislation in research and innovation, distinguishing between proactive countries characterised by commitment to equality, monitoring mechanisms, and enforcement and inactive countries where measures are fragmented, weakly enforced, or symbolic (EC 2009; Lipinsky 2014; Wroblewski 2020). The Nordic states, where gender equality is embedded in both societal norms and science policy, anchor one end of this spectrum. Germany, the Netherlands, Austria, Belgium, and Switzerland have more recently developed explicit equality policies in response to persistent underrepresentation. Spain, the United Kingdom, and Ireland have achieved stronger representation of women in research despite less developed national frameworks. By contrast, many EU-13 countries are characterised by limited or fragmented equality measures in academia (ERAC 2018). Research suggests that the gap between these groups is widening, driven by competitive gender equality markets and uneven investment in implementation (Lipinsky 2014).

The effectiveness of national legislation depends critically on enforcement mechanisms (Anagnostou 2022; Bencivenga and Drew 2021). Spain's Organic Law 3/2007, extended by Decree-Law 6/2019, obliges organisations with more than 50 employees to implement GEPs. Italy's Comitati Unici di Garanzia (CUG) bars institutions from recruitment if they fail to establish a CUG—a sanction that reinforces compliance. By contrast, in countries such as Greece and Cyprus, gender equality legislation remains

weakly resourced and lacks accountability mechanisms (Anagnostou 2022). These examples illustrate the persistent gap between law on paper and law in practice. Moreover, as Müller and Palmén (2025) argue, gender equality policies in academia operate within broader socio-cultural contexts that reproduce inequalities, particularly in highly competitive research environments. Without complementary policies addressing precarious employment or inadequate care provision, equality measures risk losing their transformative potential.

Beyond procedural compliance

The existing scholarship demonstrates that EU legal and policy interventions, alongside certification schemes, have stimulated institutional engagement with gender equality, particularly in national contexts with weak domestic policy frameworks. They have raised awareness, increased GEP uptake, established minimum procedural standards, and contributed to transnational communities of practice (Donovalová and Tenglerová 2023; Linková et al. 2023; Ovseiko et al. 2017, 2019). However, their transformative potential remains constrained by interrelated structural limitations: the absence of coherent monitoring and evaluation frameworks; the EU's reliance on incentive-based governance, which predisposes institutions towards compliance-oriented approaches in which securing funding eligibility may overshadow substantive transformation (Brescianini et al. 2024); and the risk that GEPs may be perceived as external impositions that generate resistance rather than institutional ownership (Linková et al. 2023). These limitations underscore the need to examine the conditions under which GEPs enable, rather than merely simulate, institutional transformation, moving beyond assessment of policy design towards analysis of the enabling conditions, including resources, compliance mechanisms, and credible sanctions, that determine whether formal legal commitments translate into substantive organisational change.

Interacting legal layers: case study trajectories

The INSPIRE project encompassed case studies from countries situated within distinct national legal contexts, yet each reflected the broader architecture of European regulation. These two levels frequently intersect: national frameworks may fill gaps left by supranational provisions, while European regulations provide additional legitimisation and incentives. Accordingly, the GEP is understood here not as a standalone instrument but as a mechanism shaped by interacting policy layers—a governance device whose transformative potential depends on the alignment of multiple institutional conditions. The analysis distinguishes three trajectories—transformative, procedural, and fragmented—illustrating the varying impact of EU and national legislation and certification schemes such as HR Excellence in Research and Athena SWAN.

Transformative trajectory

The INSPIRE study identified a cluster of cases in which legal frameworks played a constitutive, rather than merely facilitating, role in shaping the development and implementation of GEPs. Drawing on insights from feminist institutionalism, which examines how formal rules and organisational structures enable or constrain gender equality norms (Mackay, Kenny and Chappell 2010), the analysis suggests that legal environments do not simply provide a framework for institutional action but actively shape the conditions under which gender equality becomes possible and sustainable. This impact was most evident where certification schemes focusing directly on gender equality (CS12 and CS13) or regulatory instruments at the national level (CS2, CS3, CS8, CS12, and CS14) were in place. Such frameworks did more than articulate general principles; they defined gender equality as a policy priority by providing direction for action, allocating incentives and resources, establishing compliance mechanisms, and defining sanctions. These instruments constitute a mode of governance that binds institutions to particular courses of action while simultaneously legitimating gender equality as an organisational concern. While the conditions were fulfilled to varying extents across cases, with CS13 meeting most requirements through an award scheme combined with national, resourced policies, targets, and evaluation, the overall scope was sufficient to identify these cases as progressive in the impact of legal regulation on institutional practice.

In these cases, EU requirements tended to operate less as primary catalysts and more as supplementary levers, reinforcing existing institutional trajectories while providing additional incentives for gender equality work. This finding speaks to broader debates about the conditions under which supranational policy instruments matter: where well-developed national frameworks are already in place, the added value of EU-level requirements lies less in normative direction than in reinforcing existing momentum (Mahoney and Thelen 2010). The analytical implication is significant: the effectiveness of EU gender equality requirements cannot be evaluated independently of the national regulatory context into which they are inserted.

Institutions situated within such comprehensive regulatory environments rarely began from a position of inaction. Many had already embedded equality work within their strategic portfolios, reflecting a process of institutionalisation in which each policy cycle builds upon the last. The content of national legal frameworks was consistent across cases: requirements typically included gender-sensitive diagnosis, measurable objectives and targets (CS3, CS13), specification of targets as percentages based on the proportion of the underrepresented gender (CS2), defined timeframes (often three to six years) (CS3), and systematic collection of gender-disaggregated data (CS8). These requirements supported monitoring and compliance by making gender equality legible and auditable as an organisational outcome. Frameworks further mandated interim and final evaluation mechanisms (CS3, CS13, and

CS14) and frequently specified areas for intervention, including recruitment and promotion (CS3 and CS8), work–life balance (CS2), gender-sensitive budgeting and the gender pay gap (CS8), working conditions, training, and measures against harassment and discrimination (CS2, CS3, and CS14).

What is significant is not merely the content of these requirements but their function as accountability mechanisms. Legislation compelled institutions to diagnose their own situation, articulate their intended approach to advancing gender equality, and account for progress towards reducing the underrepresentation of marginalised groups (CS2). In this sense, legal mandates did not merely create obligations; they contributed to the institutionalisation of gender equality machinery by clearly allocating responsibilities within institutions, leading to the creation of equality units (CS3), committees, or designated officers, or indicating who should be involved in developing the GEP (CS14). In some cases (CS3), equality representatives were required to participate in decision-making bodies, thereby embedding gender expertise within formal governance structures rather than delegating it to peripheral roles. National regulations frequently specified reporting obligations to ministries or supervisory agencies, required internal audits or periodic reviews, and defined sanctions for non-compliance (CS12 and CS13). Such legal mechanisms served to legitimise GEPs, affording them a recognition that non-mandatory initiatives rarely achieve. Legislation also provided a framework for allocating financial and human resources to support equality initiatives (CS3, CS12, and CS13) or obliged institutions to collect and analyse gender-disaggregated data across indicators such as workforce composition, pay, and parental leave uptake (CS14). In some contexts (CS12), detailed national recommendations specifying practical steps for advancing gender equality proved particularly useful, translating legislative requirements into concrete organisational guidelines.

A similar, though institutionally distinct, pattern emerged where award-bearing schemes such as Athena SWAN (CS13) assumed a central governance role. Drawing on the concept of corporate reputation (Brammer and Pavelin 2006), these schemes operated simultaneously as reputational benchmarks and governance instruments. Accreditation functioned as a quality standard, a reputational asset, and organisational incentive. The scheme was perceived by participants as a significant mechanism for translating equality, diversity, and inclusion (EDI) policy commitments into practice, a finding that points to the importance of process, not only outcomes, as a driving force for institutional change. The scheme's influence derived not only from the standards it articulated but also from its procedural demands: continuous data collection and analysis, self-assessment processes, and regular gender audits. Through these mechanisms, GEPs were repositioned from optional or project-based initiatives to integral components of institutional governance, with a formalised division of work between the EDI office and academic departments.

The case of CS13 illuminates the significance of the departmental level as a site of equality-oriented change. By requiring departments to undertake

their own needs assessments and develop contextually adapted strategies within the broader institutional GEP framework, the scheme facilitated more precise identification of specific challenges and enabled a form of ownership over the change process. This is consistent with organisational sociology's emphasis on local sense-making in the implementation of institutional mandates: top-down frameworks are more likely to produce durable change when translated into, and owned by, sub-institutional units.

A defining feature of both certification schemes and national regulatory frameworks is their insistence on monitoring as an accountability mechanism. In award schemes, external evaluation—whether through site visits or remote audits—is combined with progress reporting and cross-institutional benchmarking. Compliance is tied to funding eligibility and carries significant reputational consequences: failure to renew an award may signal institutional stagnation. While such consequences were especially noted in relation to Athena SWAN, similar dynamics were observed regarding the HR Excellence in Research Award, which also requires self-assessment, external evaluation, and demonstrable evidence of continuous improvement. Award schemes thus oblige institutions to demonstrate commitments through organisational practices rather than symbolic declarations.

Procedural trajectory: obligating without compelling

The second trajectory emerged in contexts where European frameworks, national legislation defining gender equality as a basic principle, and institutional commitments were broadly supportive of gender equality but unevenly specified, weakly resourced, and largely devoid of sanctions for non-compliance. Reflecting what Beveridge (2012) termed 'soft' governance, these legal environments can be characterised as obligating without compelling: they created a normative architecture around gender equality without generating the enforcement structures necessary to translate it into durable institutional practice.

Legal frameworks in these settings required GEP implementation (CS4, CS5), mandated the development of a gender diagnosis (CS4), set timeframes (CS5), defined minimum GEP content (CS4, CS5), and required the establishment of equality units with sufficient structures (CS5). In some cases, national legislation addressed higher education directly, incorporating measures aimed at gender balance across academic careers; work–life balance; the prevention of female dropout; and protocols against sexual harassment, sexist violence, and discrimination (CS4 and CS5), including the integration of LGBTQI+ perspectives within curricula (CS5). Yet despite this apparent breadth, the frameworks shared a critical structural limitation: they did not provide dedicated financial resources (CS5), at best offering a basis for resource allocation without specifying funding streams or quantum (CS1). Equality work was thus legitimised in principle yet limited to what was minimally prescribed by law (CS1).

The institutional consequences were considerable. Without dedicated budgets or meaningful sanctions (CS4, CS5), implementation frequently depended on short-term project funding, rendering equality initiatives vulnerable to funding cycles and shifting institutional priorities. This created what might be termed an 'implementation gap': formal policy commitments were bridged not by institutional structures but by the goodwill of individual actors and the contingent availability of external resources. The result was uneven uptake: voluntary engagement existed alongside institutionally recognised activity, but without accountability mechanisms capable of producing sustained change. Where multiple national or regional laws regulated different dimensions of gender equality, overlapping responsibilities between different bodies further diffused accountability (CS1). On a practical level, the absence of clear guidelines, evaluation methodologies, and monitoring systems prevented institutions from developing a coherent understanding of what was expected of them and how to measure change. Implementation remained limited even where legal frameworks directly addressed HEIs, embedded gender equality as a guiding institutional principle (CS5), and mandated the development of dedicated structural arrangements (CS4). This points to the insufficiency of legislative scope alone as a driver of change. As feminist institutionalist scholarship has emphasised, formal rules are necessary but not sufficient conditions for transformation: their effects depend critically on enforcement mechanisms, resource commitments, and the actors positioned to sustain them.

Where legislation lacked precision or enforceability, external funding schemes—structural funds, competitive grants, or European framework programmes—proved to be effective drivers. However, this shift subtly but significantly reconfigured the meaning of equality work. Rather than being framed as a normative commitment grounded in social justice or structural redress, gender equality was often positioned as a performance indicator within broader narratives of institutional excellence, innovation, or international competitiveness (CS1). This reframing carries the risk of producing outcomes that are symbolic, temporary, and dependent on individual goodwill rather than embedded in systemic change.

Notwithstanding these structural limitations, legislation played a non-trivial role in legitimating gender equality as an institutional concern. As several interviewees noted, external legal requirements increased the visibility and acceptance of gender equality work, even among those initially resistant, by repositioning equality interventions as legally mandated institutional obligations rather than ideologically motivated proposals. This legitimating function of law is a recurrent finding in the policy translation literature (Squires 2007), and the case studies confirm its relevance here. Nevertheless, where sustained national funding was absent, the scope and ambition of GEP implementation remained contingent on the institutional standing of equality officers and the extent of senior leadership commitment. Legal regulation tended to secure baseline compliance, ensuring that prescribed measures were formally adopted, while more transformative initiatives struggled to attract institutional priority or additional resources.

Fragmented trajectory: EU conditionality and the limits of external leverage

In several cases (CS7, CS9, CS10, and CS11), HEIs and RPOs operated without dedicated national legislation targeting gender equality in academia. Equality provisions were framed through general anti-discrimination and labour laws, most commonly derived from the transposition of EU directives or from Horizon funding requirements (CS9, CS10, and CS11). In one case (CS11), equality legislation stemmed from broader historical legacies reflecting commitments to reproductive rights or family planning rather than targeted interventions in academia. These instruments typically secured labour rights—protection against discrimination, parental leave, and work–life balance measures (CS9 and CS10)—but did not challenge the structural dynamics shaping academic careers, knowledge production, and institutional governance. As Cacace (2009) and Caprile et al. (2012) argue, such frameworks tend to treat academia as gender-neutral, overlooking the specific institutional barriers that disadvantage women and other underrepresented groups. Interviewees emphasised the need for legislation directed specifically at higher education (CS9 and CS10) and highlighted the proliferation of strategies and action plans that remained on paper owing to absent incentives and capacities for implementation (CS11).

Against this backdrop, the European Commission's introduction of GEPs as an eligibility criterion for participation in Horizon Europe constituted a decisive institutional intervention. This policy move signalled more than administrative reform: it articulated gender equality as both a core European value and a precondition for research excellence, aligning it with competitiveness, innovation, and institutional legitimacy. In countries where national frameworks were weak or non-specific (CS9, CS10, and CS11), the requirement provided minimum standards, legitimised equality initiatives, and offered equality officers a mandate that did not depend solely on internal advocacy. It complemented earlier instruments, including the HR Excellence in Research Award, which had begun to introduce procedural templates for equality work. The requirement to possess a GEP, even if minimally defined, created baseline infrastructure: institutions were compelled to designate responsible actors, outline objectives, and formalise reporting practices (CS10). The symbolic impact of EU-level requirements was especially visible: by helping to build networks and alliances and raising awareness among management, researchers, and staff, European conditionalities contributed to shifts in institutional culture that exceeded their immediate procedural effects (CS11).

The relationship between European requirements and national agency was, however, more complex than a top-down diffusion model would suggest. As practitioners noted (CS11), EU legislation is understood as a facilitating but subsidiary factor: the development and implementation of GEPs ultimately depends on the knowledge and commitment of feminist scholars, and legislation serves as a tool in their hands rather than as the primary

engine of change. This observation is consistent with the literature on the role of norm intermediary actors in giving effect to formal requirements (Squires 2007; see Chapter 6). Moreover, reliance on external funding, including competitive grants to cover basic operational costs such as equality officer salaries (CS10), introduced significant structural vulnerabilities. While some improvement over time was evident, with institutional funding becoming available and ministerial financing reaching higher-performing universities (CS9 and CS10), there remained a persistent risk that gender equality would be instrumentalised to enhance institutional positioning—to demonstrate research and teaching performance—without substantively addressing the roots of structural inequality.

The transformative capacity of this procedural turn remained contested (CS9 and CS10). The absence of clearly articulated compliance criteria, particularly regarding sanctions and the transparency of evaluation standards, limited the depth of change. Monitoring mechanisms frequently relied on internally generated reports, and data collection was uneven and incomplete. Compliance thus depended on institutional goodwill rather than enforceable accountability structures. The concern that gender equality risked becoming a tick-box exercise oriented towards satisfying EU funding requirements rather than driving substantive change maps onto a broader analytical problem: the co-optation of equality discourse by institutional performance regimes may produce the outward form of compliance while leaving underlying structures intact.

Despite these limitations, European-level policies have stimulated the creation of equality infrastructures across diverse national contexts, contributing to the establishment of national units or designated positions with responsibility for gender equality. Yet whether these mechanisms can move beyond procedural formality to deliver sustainable structural transformation remains contingent on sustained resources, independent external monitoring, and meaningful sanctions for non-compliance.

From compliance to transformation: resources, accountability, and the conditions for institutional change

The three trajectories traced in this analysis—transformative, procedural, and fragmented—are not merely descriptive categories but reflect distinct configurations of the relationship between legal prescription and institutional capacity. What the comparative analysis reveals is that the gap between the formalisation of gender equality commitments and the conditions necessary to sustain their implementation is not incidental but structural: it is produced by the interaction of three enabling conditions whose presence or absence determines whether legislation functions as a driver of institutional transformation or merely as a set of procedural guidelines. These conditions—adequate and stable resources, coherent compliance mechanisms, and credible sanctions for non-compliance—operate not independently but as an

interdependent triad. Drawing on feminist institutionalist accounts of the conditions under which formal rules acquire transformative force (Clavero and Galligan 2020; Mackay, Kenny and Chappell 2010), the comparative variation observed across cases can be explained by the degree to which these conditions are simultaneously present and that the absence of any one significantly constrains the transformative potential of the others.

The absence of stable, dedicated funding for gender equality work was a consistent finding across trajectories, and its implications extend beyond the practical. As the institutionalist literature has long emphasised, the allocation of resources is not merely a technical precondition for policy implementation but a signal of organisational priority: what is funded is what is valued, and what is not funded is structurally marginalised regardless of its formal status. Participants across cases emphasised that without sufficient and stable financial and human resources, legal obligations are unlikely to produce sustained institutional change. Legislation does not automatically entail financial provision: it may create obligations without securing organisational capacity to fulfil them. The majority of HEIs relied on external, often competitive funding sources—European Commission structural funds, national grants, or ministerial programmes—frequently earmarked for specific thematic priorities or for the establishment of equality, diversity, and inclusion structures. While such funding enabled innovation and catalysed institutional action, it introduced what can be termed 'temporal fragility': equality initiatives were tied to funding cycles rather than embedded within core institutional budgets, rendering them vulnerable to shifting political priorities and the contingencies of external competition. This dynamic produced a characteristic pattern in which equality work was simultaneously institutionally recognised and structurally precarious—present in the strategy but not acknowledged in the budget. The implication for policy design is clear: effective legislation must specify mechanisms for resourcing implementation. Where it fails to do so, the burden of implementation is externalised onto individual actors, producing a reliance on committed gender experts whose influence, however significant, cannot substitute for structural provision.

Considerable variation was also evident in the development and transformative potential of accountability structures. In many national settings, compliance provisions were weakly specified or largely absent, leaving institutions without clear guidance regarding quality standards. While legal frameworks fostered procedural compliance and enhanced institutional learning, they did not always provide clear and coherent expectations regarding quality standards. They tended to set general parameters, indicate recommended thematic areas, and specify implementation processes—leaving considerable space for variation in the ambition of institutional responses and creating a landscape in which procedural compliance and substantive transformation coexisted in an uneasy and often indeterminate relationship. By contrast, certification schemes focusing on gender equality in HEIs provided more structured approaches, requiring periodic accreditation renewal

and obliging institutions to demonstrate measurable progress against defined objectives. They combined procedural requirements—self-assessment, external audit, and data collection—with substantive thematic expectations addressing work–life balance, the pay gap, recruitment practices, and career progression. Award classifications functioned as publicly visible markers of institutional commitment. Importantly, such schemes served a supplementary function where national legislative frameworks were weak: by providing standardised models, defining review cycles, and linking interventions with incentives and sanctions, they advanced gender equality where legislation alone was not effective. The most significant progress was observed where progressive national regulation and certification schemes operated in combination, their joint effect exceeding either instrument alone.

The credibility of sanctions for non-compliance proved equally decisive. Across the case studies, interviewees repeatedly expressed concern that penalties for inadequate engagement were either unclear, weakly enforced, or effectively absent. Where consequences were uncertain, institutions might formally adopt GEPs while implementing them inconsistently, producing the appearance of compliance without its substantive content. The widespread concern that gender equality would be reduced to a procedural exercise oriented towards securing funding eligibility rather than driving substantive change reflects precisely this risk. The comparative evidence suggests that effective legal frameworks require clearly articulated criteria for assessing non-compliance, operating through two principal mechanisms: linking equality compliance to research funding access, and tying non-compliance to reputational consequences. In both, gender equality is connected to the incentive structures that most significantly govern institutional strategies, with implications for scientific and administrative functioning as well as competitive positioning. The mechanism here operates on two registers. Drawing on the responsive regulation framework, we can distinguish between deterrence-based compliance, in which institutions act to avoid material penalties, and persuasion-based compliance, in which institutions internalise norms through sustained engagement with regulatory expectations (Ayres and Braithwaite 1992). The transformative trajectory cases demonstrate that the most effective regulatory environments combined both registers: credible material sanctions (loss of funding eligibility) were accompanied by reputational mechanisms (award classifications and public benchmarking) that sustained institutional engagement beyond minimal compliance. The broader implication is consistent with Baldwin, Cave, and Lodge's (2012) emphasis on the credibility of sanctions as the critical variable: sanctions signal the value attached to equality by those with the power to allocate resources and confer status. Without them, legislation communicates aspiration without consequence, and its capacity to shift institutional priorities remains sharply constrained.

Finally, national and European legislation carries the risk of constraining the scope of equality work. Across most cases, gender equality was framed

in relatively narrow terms, oriented primarily towards women's career progression, work–life balance, and representation in decision-making. As the scholarship on intersectionality has demonstrated, such framing risks producing a one-dimensional understanding of inequality that hinders analysis of gender alongside ethnicity, class, sexuality, disability, or precarious employment (Crenshaw 1991; Verloo 2006). In several national contexts, legislation continued to reflect binary and heteronormative assumptions, and intersectionality was not consistently recognised within legal frameworks. The consequence is that policy instruments may reify gender as a simple categorical variable, rendering invisible the experiences of racialised minorities, LGBTQI+ communities, and precariously employed researchers whose marginalisation is not captured by dominant legislative categories. The Horizon Europe GEP requirement has begun to challenge this narrow framing, encouraging institutions to develop policies that move beyond compliance-driven approaches and address structural inequalities more comprehensively. Yet, at the time of this research, intersectionality remained a discursive aspiration rather than a regulatory reality: no enforceable indicators or minimum standards had been established, and the concept has not been consistently operationalised across national legal frameworks. This gap reflects what Verloo (2006) has identified as a structural tendency within equality governance to produce 'one-at-a-time' approach that treat inequality categories as discrete and hierarchically ordered rather than as mutually constitutive. The consequence for GEPs is significant: where legal frameworks define gender equality in categorical terms, institutions are incentivised to address gender in isolation from other axes of disadvantage, producing equality interventions that may benefit some women while leaving the structural conditions of exclusion for others intact. The discursive broadening of the equality agenda at the European level thus remains unmatched by the legislative and institutional infrastructure necessary to give it substance, which is not only a limitation of current policy but also a structural constraint on the transformative potential of GEPs as instruments of institutional change.

Conclusion

The INSPIRE case studies demonstrate that GEPs are shaped by interacting policy layers: EU regulation and national legislation operating not independently but in configurations whose alignment determines whether institutional change is transformative, procedural, or fragmented (see Table 7.1). Across these trajectories, three conditions distinguish legal frameworks capable of supporting structural transformation: independent, publicly visible compliance mechanisms extending beyond internal reporting; credible sanctions linking non-compliance to funding eligibility or institutional standing; and sustained, non-competitive resourcing embedded in core institutional budgets. Where certification schemes such as Athena SWAN operated alongside progressive national legislation, their combined effect exceeded either

instrument alone. Even in weaker regulatory contexts, legislation played a legitimating role, repositioning equality work from ideological advocacy to institutional obligation—yet without adequate resources and sanctions, this legitimation produced procedural compliance rather than substantive change. The narrow, categorical framing of most legal frameworks further constrained transformative potential, marginalising intersectional perspectives and the experiences of groups beyond dominant legislative categories. The question is not whether European and national legislation matters—it demonstrably does. The more pressing question is whether these frameworks can be invested with the material, organisational, and normative conditions required to move from compliance to transformation.

Distinguishing critical levels of Enforceable Legislation

Table 7.1 Four levels of calibration thresholds and their corresponding indicators and set-membership scoress for 'Enforceable Legislation'

Brief description	*Indicators*	*Set-score*
Comprehensive legislation, external compliance check and credible monetary sanctions	• Comprehensive, progressive national, regional, and EU policies regarding gender equality and EDI at the organisational level. Sufficient resources for effective implementation, monitoring, and compliance checks are available (e.g., ministerial or organisational level) by dedicated, specialised staff. • High-quality compliance frameworks by independent organisations on gender equality and EDI process, themes, and outcomes, impact available. Compliance checks quasi-obligatory. • Credible sanctions are in place to penalise non-compliance by withdrawing monetary funds and affecting status and prestige of organisation. Sanctions affect science/research activities directly.	1.0
Comprehensive policies, external voluntary compliance, status-based sanctions	• Comprehensive policies and solid legal framework regarding gender equality and EDI at the organisational level available. Resources cover rudimentary implementation, that is, add-on responsibilities on existing job profiles. • Compliance checks are available by independent organisations but largely voluntary and targeting implementation but not outcomes/impact. • Sanctions affect loss of status and prestige in a credible way, for example, through highly visible rankings, widely recognised gender equality and EDI certificates, gender rankings. Sanctions affect mainly administrative level of organisation but not scientific operations.	0.67

(*Continued*)

Table 7.1 (Continued)

Brief description	*Indicators*	*Set-score*
Fragmented policies, internal compliance, symbolic sanctions	• Isolated and fragmented policies in place; weak legal provision at the organisational level. Few to no resources available; implementation mostly based on voluntary efforts. • Compliance checks mostly carried from within the organisation, limited to monitoring some output indicators/implementation. Criteria for non-compliance not clear. • Sanctions are purely symbolic that remain without consequences at the administrative or scientific level of the organisations.	0.33
No policies, no compliance checks, backlash against gender	• Unsupportive or counter-productive policy and legal framework in place. No provision of gender equality and EDI at the organisational level. • No compliance checks available. • Backlash and sanctions when engaging with gender equality and EDI.	0.0

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8 The role of cultural, political, and social context in structural change for inclusive gender equality

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Introduction

The wider (national) socio-political context highly influences the processes of design and implementation of gender equality and equality, diversity, and inclusion (EDI) policies in academic and research organisations. While both practitioners and scholars are in agreement that context is relevant (Addabbo et al. 2020; Barnard et al. 2016; Cacace et al. 2015; De Micheli and Vingelli 2022; Milenkova 2021; Ranea-Triviño et al. 2022), it remains elusive as to how exactly to evaluate features of supportive or unsupportive context for gender equality and EDI change and context-specific outcomes (Ní Laoire et al. 2021) and how to compare different national settings in this regard. Studies emphasise that context should not be viewed as a static backdrop to an institutional policy implementation but instead as playing "a crucial constitutive role in the interpretation, enactment, and impact of gender equality policy in [higher education]" because gender equality policies become "differently translated and enacted into practice in different contexts" (Ní Laoire et al. 2021:575, 578). It is also often argued that context needs to be viewed from a long-term perspective of larger cultural change and social justice efforts.

Building on the analysis of 14 gender equality plans (GEPs) impact case studies, we propose a multifaceted understanding of context across three dimensions—cultural, political, and social—emphasising its temporal and dynamic nature. Using dimension-specific indicators, we assign each case to one of four levels: very supportive, rather supportive, rather unsupportive/hindering, or hostile context for gender equality and EDI changes. This framework allows us to analytically separate spheres that strongly interact with each other and remain dynamically interconnected but also to observe the interaction of each dimension with the institutional context of higher education and research.

We situate our chapter, firstly, within the context of the neoliberal turn in academia, which has significantly transformed higher education by emphasising market logic to enhance competitiveness and productivity (Ivancheva,

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Lynch, and Keating 2019; Papadakis and Drakaki 2023). As this neoliberal turn tends to individualise the reasons for inequalities and rejects their structural roots, this may feed resistance against gender equality efforts (Aavik 2017; Sekuła et al. forthcoming).

We also recognise the crucial role of culture in shaping the context of gender equality efforts. From a structuralist perspective, culture not only reflects material power relations but also legitimises and reproduces them through norms that maintain social hierarchies (Abbott, Wallace and Tyler 2005:44). Following feminist theory, we understand gender (and gender equality) as a cultural system of meaning-making through which hierarchies are organised and justified (Scott 1986). Feminist critical scholars further show that counter-hegemonic practices can destabilise dominant cultural codes (Fraser 2007). As Fraser argues, lasting cultural transformation requires both redistribution of material resources and recognition through changed values; otherwise, institutional reforms risk remaining superficial. Within higher education, addressing material structures through policy is only half the battle; unless there is a concurrent shift in the 'politics of recognition' regarding whose knowledge is prioritised, whose work and identities are valued, systemic cultural change will fail to materialise.

Further, we are aware that scholars examining popular attitudes toward gender (equality) norms have documented cultural change, ranging from stronger traditionalism to stronger egalitarianism, that has taken place over time, globally. However, this shift is not a simple unilinear progression but rather reflects the transformation of attitudes into different forms of egalitarianism (Knight and Brinton 2017). The rise in the number of people who are ambivalent about gender equality showcases multiple coexisting constellations of gender-role attitudes within the same society (Begall, Grunow, and Buchler 2023; Scarborough, Sin, and Risman 2019).

Finally, an additional crucial factor concerns the anti-democratic backlash and the presence of right-wing governments with agendas excluding or reverting equality efforts and policies (Mejstřík and Handl 2021; Scharnagl 2026). These new iterations of anti-feminism and anti-gender mobilisation (Kuhar and Smrdelj 2025) are importantly shaping what we try to analyse as a context of implementing gender equality efforts in academia. This issue was particularly emphasised by gender equality experts from Central and Eastern European countries who noted that negative connotations associated with the term 'gender' within national political discourse are impacting policy implementation (Krzaklewska et al. 2023).

This chapter is structured as follows: after presenting literature on how the context of structural changes has been conceptualised, we explain the details of the methodology adopted and its limitations. We then present our framework, discussing three dimensions of context—cultural, political and social—and propose the indicators for evaluating individual cases via a calibration table. Finally, we provide concluding remarks.

Conceptualising the context of structural change

In theories of organisational behaviour, context is described as "the surroundings associated with phenomena which help to illuminate those phenomena, typically factors associated with units of analysis above those expressly under investigation" (Cappeli and Sherer 1991 in Johns 2006:386). Thus, organisational characteristics provide context for individual members, and the external environment provides context for organisations (Cappeli and Sherer 1991 in Johns 2006:386). Gary Johns further defines "context as situational opportunities and constraints that affect the occurrence and meaning of organisational [behaviour]" (Johns 2006:386).

As contextual factors are an important aspect of designing and implementing gender equality interventions, it has been argued that organisational change should be tailored to specific disciplines, fields, and organisations, as well as geographical locations (Brink and Benschop 2012). Sybille Reidl and colleagues (2020) argue that different contexts require different policies and measures to promote gender equality, which also influence the effects of these measures. They propose several contextual factors, including political and legal frameworks, economic and structural conditions, research and higher education system characteristics, cultural and social norms, structural gender inequalities, and transnational influences (Reidl, Beranek, and Palmén 2020). Other authors emphasise that the relations between policy inputs and outcomes are nonlinear, as outcomes are affected by numerous contextual variables, which change over time and across different settings (Kalpazidou Schmidt and Cacace 2019).

From the literature, we take the premise that the policy's inputs as well as outcomes are influenced by the context but insist that it needs to be observed relationally—not as a static external circumstance but rather as a setting that affects each institution differently and which is temporally and spatially contingent.

Methodology

Within the broader methodological framework of the research on supportive and hindering factors for GEPs (see Chapter 2), this chapter draws on a qualitative, comparative, and interpretive approach. We, this chapter authors, divided among ourselves the analysis of the 14 GEP impact case study reports, each of which compiled desk research, institutional analysis, and excerpts from interviews with stakeholders. We developed a coding scheme, revising it throughout the process, clustering the codes into four main aspects: political, social, and cultural dimensions, while additionally distinguishing features of the higher education setting.[1] Within each dimension, specific codes were designed to guide systematic comparison. A matrix method was then employed, where relevant excerpts from the case study reports were collected and thematically organised.

Throughout the process of analysis, we have come to the realisation that the three dimensions—cultural, political, and social—stand at a macro level, while the fourth one, i.e., the higher education setting, is not a standalone dimension but rather a field where the cultural, political, and social features of the context are reinterpreted, amplified, or negotiated.

Several limitations of this analysis need to be acknowledged. First, the case study design, by focusing on the creation and implementation of gender equality and EDI measures at an institution, left limited room for gathering all elements of the wider extra-institutional context, including the gender regime. Therefore, information about the context appeared mostly in between the lines if respondents introduced an issue themselves or if the interviewer pursued discussion of an issue in greater detail. A second limitation concerns the fact that interviews and the case studies captured a specific moment in time (after completion of one GEP lifecycle or EDI initiative), therefore lacking a longitudinal temporal perspective that is important for contextually understanding institutional change. This is also connected to the very nature of the gender equality and EDI initiatives, many of which are project-based and temporally limited, lacking continuity as a result. This further complicates efforts to assess long-term institutional change.

Supportive context: main findings of comparative analysis

Below we present findings from a comparative analysis of 14 GEP impact case studies, clustering contextual features into three dimensions—cultural, political, and social—that intersect within higher education settings. In each of the three dimensions, we indicate the level of support it exemplifies on a four-level scale: very supportive, rather supportive, rather unsupportive/hindering, and hostile.

Cultural dimension

The cultural dimension is part of the macro level, which is comprised of cultural norms, values, and beliefs operating within a society, including more traditional or more egalitarian attitudes towards gender roles, in both the private and public spheres (Knight and Brinton 2017; Scarborough et al. 2019).

A 'very supportive' cultural context for gender equality in academia generally stems from broader societal changes regarding norms and values (Klenk et al. 2022:146), which indicate a shared consensus regarding the importance of gender equality (Broka and Kūkoja 2022; Doneva and Gaftandzieva 2021). In such a cultural framework, men and women are considered equal, male primacy is denied, sex-based differences in abilities and predispositions are presumed to be trivial, and the imperative to enact symmetrical roles is emphasised—that is, both men and women should participate in the labour force and divide household labour equally (Knight and Brinton 2017:1492).

Our analysis of case studies confirms that cultural norms define what behaviour and speech are deemed acceptable in academic settings, showcasing that certain discourse has shifted from being unquestionable to being challenged. As an interviewee from Iceland states, "people […] feel like the culture has changed, that it's less acceptable to say [certain] things" (CS13). For them, this is the most important aspect of institutional change since it lingers even after policies and project funding run out: "you can write policies, you can bring in projects, but until the culture actually changes, […] you know, funding runs out, we go back to the way we were" (CS13).

There are several ways in which a supportive cultural context can emerge, often observed in the historical legacies of gender equality initiatives, positive structural employment conditions, and efforts for the synchronisation of work and care (Cukut Krilić 2017; Mihajlović Trbovc et al. 2022; Petrović 2021). In a Serbian university, for example, a long-standing gender studies tradition contributed to creating a favourable institutional culture (CS11). According to one interviewee: "the culture exists, so this was […] inherited from the socialist times" (CS11).

In contexts categorised as 'rather supportive,' the environment for gender equality institutional change is often hampered by ambivalence, where traditional gendered roles in professional and domestic spheres are still implicitly reinforced (Begall et al. 2023). In such a cultural context, gender egalitarianism may take the form of "decisional autonomy," emphasising personal choice (Knight and Brinton 2017:1489), hence facilitating the proliferation of "choice feminism," "a type of contemporary feminism that encourages a variety of women's life choices" that has been observed in "more wealthy societies" (Begall et al. 2023:184). This pattern may be reflected in gender ideologies characterised by egalitarian views that endorse women's right to choose between paid work and childcare (Begall et al. 2023:184), or partners' autonomy in choosing to take on caregiving and breadwinning roles (Knight and Brinton 2017:1487). However, in such settings, seemingly organised by personal choices, it has been observed that individuals may prefer asymmetrical roles when such roles are seen as freely chosen, which alludes to the persistence of gender-essentialist conceptions of women's caregiving role (Knight and Brinton 2017:1489–90), thus perpetuating gender-essentialist views on men's and women's abilities and traits (Begall et al. 2023:183).

An unsupportive cultural context is marked by hegemonic cultural beliefs about gender roles that not only perpetuate essentialist attitudes but also naturalises them as 'normal', therefore curbing the realm of 'free choices' about the division of work and care by deeming certain options as 'outside of normal.' To exemplify, such a context is ruled by widespread support for the traditional division of family roles, prioritising the male breadwinner model over gender equality and unequal distribution of reproductive and care work (Angeli 2020; Pološki Vokić, Obadić, and Ćorić 2019). This translates into low integration of women into the labour market (Klenk et al. 2022; Reidl et al. 2020), prejudices towards women's participation in the paid labour

force (Milenkova 2021), and stereotypes in gender-based professional selection (Janušauskienė 2016; Urmann et al. 2021), all of which result in poorer career advancement prospects for women.

Lastly, a hostile cultural environment is characterised by negative attitudes towards the idea of gender equality as such (Diogo et al. 2021; Tăriceanu 2022), opposition to the term 'gender' as a political concept, as exemplified by anti-gender narratives (Ranea-Triviño et al. 2022; Sekuła et al. 2023) or viewing gender equality as an imposition by foreign powers and a threat to traditional national values (Caprile et al. 2022:165–66). Dominant cultural values are heteronormative, patriarchal, and aligned with the traditional gender order (Băluță 2020; Dragolea 2022). The patriarchal backlash and overt misogyny, which are often misrepresented as "culture wars" in mainstream accounts (Johnston and Meger 2025:511), have material implications in an institutional setting, where gender equality and EDI principles are either directly opposed or silenced.

In the case of Serbia, for instance, the Orthodox Church and conservative intelligentsia framed their opposition to gender equality legislation through the discourse of 'protecting' Serbian tradition and conservative values (Zaharijević and Antonijević 2024). The conflict plays out as a battle over meaning: regressive forces have instrumentalised traditional values, juxtaposing them against so-called 'Western' ones and positioning the gender equality principle in the latter cluster. Even though feminism was present in the country for (at least) four decades, it has been later discursively linked to the EU accession process—as a result, gender equality was seen as an obligation rather than a recognised value (Zaharijević and Antonijević 2024). This national 'culture war' also played out at the university level, where 'change agents' and gender scholars involved in gender equality policy implementation described what they do as being "revolutionary" and demanding a lot of "courage" (CS11). Another example of a hostile cultural context is a "macho culture" mentioned in the case study from Spain (CS4), where various elements of patriarchal gender relations, including gender-based violence (GBV), have become part and parcel of the institutional structure and are thus normalised. As one interviewee explains, the root cause is patriarchy: "the androcentric culture that reproduces stereotypes and will continue to reproduce them" (CS4).

Political dimension

The political dimension refers to the level of the wider political climate regarding gender equality. While progressive political actors may support egalitarian principles, those critical of gender equality policies and values—including right-wing and conservative actors—may undermine them. Thus, the political dimension of a context in which gender equality measures are implemented in academia reflects the extent to which key actors, documents, and processes support gender equality in principle. Since Chapter 7 directly

addresses enforceable legislation, we focus on political actors who hold interpretive authority and define the norms and values written into social policy. These actors hold cultural values and gender beliefs that influence the adoption of social policy and dictate the political climate.

First, there were just two cases in our study that described a very supportive political climate. One is located in Iceland (CS8), where long-standing political commitment to gender equality is rooted in historical events, such as a protest 'Women's Day Off' on 24 October 1975, when 90% of Icelandic women went on strike to demonstrate their indispensable contribution to society. The country's progressive politics are embedded in national legislation, such as the Icelandic Constitution and the Gender Equality Act. The high level of unionisation supports measures enforcing gender equality in the workplace (equal pay or parental leave policies). A second institution reporting no resistance to its equality work was located in Ireland. There, a respondent confirmed that the country has fostered a favourable political climate for gender equality, bolstered by the enforcement of robust EDI legislation. This shift occurred primarily over the last decade, following the public endorsement of gender equality by the country's president (CS13).

Second, the largest group of cases in our research are located in countries with a rather supportive political climate—where gender equality is generally considered to be a political value but not a priority issue and as such is expressed through singular fragmented actions, policy initiatives, and regulations. In many countries, the overall direction of the European Union (with GEP eligibility criteria and structural programme funding), as well as the country-level policy initiatives, adequate legislation, and programmes, constitutes a strong basis for institutional change. However, this general direction might still meet resistance. This group comprises countries with previously progressive political climates—such as Germany, Spain, and the Netherlands—that are currently contending with a surge in anti-immigration rhetoric or right-wing backlash. The associated political actors, along with policies hindering internationalisation, can reshape the national agenda even without being in power by shifting the boundaries of political debate and institutional priorities.

In national contexts with a rather supportive climate, resistance can be subtle, without explicitly reversing the general supportive policy direction. In Spain (CS6), the clear political direction towards supporting gender equality on the national government level is undermined by anti-gender and GBV denialist discourses that are also present in the public sphere. Universities in Ireland, which operate within an otherwise gender-egalitarian national framework, nevertheless face ongoing resistance from groups opposing initiatives that support trans students and employees. In one of our case studies, such a group organised an online campaign against the introduction of a name-change policy for students. This backlash was interpreted by the staff as mirroring wider far-right movements within Irish society, which have been organising semi-violent protests targeting LGBT+ libraries/publications or sharing negative attitudes against immigrants (CS12).

Third, in countries with a rather unsupportive political climate, gender equality and EDI principles are competing with other political values and tend to be sidelined or openly questioned. Case studies from Poland are exemplary of this political dynamic. While a national gender equality policy framework exists (ensuring protection from discrimination and work-life balance measures), nationwide initiatives supporting gender equality in science are lacking, with the exception of programmes supporting women in science, technology, engineering, and mathematics (STEM). The two institutions we observed, both started to develop gender equality policies a decade ago (CS9 and CS10), did so during a time when the right-wing conservative party was in government, openly voicing opposition to 'gender ideology' and LGBTQI+ rights. On the backdrop of the hostile national political context, the European agenda for gender equality provided crucial leverage for acting—starting with higher education excellence initiative, gender equality strategy 2020–2025, and the GEP Horizon eligibility criteria and relevant funding (Krzaklewska et al. 2023). As one of the informants stated, "if there wasn't this requirement from the European Commission that … institutions have to have GEPs, then surely forget it, it wouldn't be implemented in institutions in Poland for sure" (CS9).

Fourth and finally, an unsupportive or hostile political context for gender equality measures is one in which gender equality and EDI principles are openly contested within the political sphere, either disqualified or framed as a threat, while gender equality and EDI policies are systemically resisted. The case study from Serbia demonstrates the (re)emergence of nationalist far-right ideology, which treats gender equality policies as an external imposition by foreign powers—overlooking the fact that both gender equality policies and feminist movements were strong in socialist times. The Serbian Orthodox Church has played a vocal role in public discourse, questioning the legitimacy of gender-sensitive use of language, contributing to a constitutional review of the newly enacted Law on Gender Equality, which indirectly resulted in the suspension of some planned GEP activities at the universities in the country (CS11).

Social dimension

We understand the social dimension[2] of a context to be comprised of relevant external collaborations of institutional stakeholders and strategic alliances among institutions, as well as civil society coalitions around issues relevant to the implementation of gender equality measures in academia. If these networks of cooperation are dedicated to equality issues, we consider them to constitute a supportive social context for gender equality and EDI institutional changes. The more impactful and durable such cooperations are, the more supportive the social context is. We find that a lack of collaborations, alliances, and coalitions that are promoting equality principles, hindering the social context for gender equality and EDI changes, since such networks are often an indispensable push factor. On the other hand,

there might be groups or networks, outside of institutions, that are actively advocating against gender equality and EDI values which, if influential, create a hostile context for gender equality and EDI changes. Finally, when evaluating the social dimension of a context, we also need to pay attention to wider social movements that are influencing (for better or worse) the creation of equality measures in academic institutions, such as feminist and other social justice movements, or the so-called anti-gender mobilisations (Kuhar and Smrdelj 2025).

First, countries with a very supportive social context are those where inter-organisational collaborations are stable over longer periods of time and contribute to institutional commitment, conducive to the planning and implementation of gender equality and EDI measures. Inter-institutional cooperation is important for creating strategic institutional commitment (see Chapter 3). Here, we note a difference between ad hoc or one-time coalitions that usually focus on a single topic and a long-term alliance between institutions that covers a range of issues. In this regard, the most favourable scenario would be when a pre-existing institutional cooperation, such as a national rectors' conference, incorporates work on gender equality into its regular operation (CS4). Comparatively favourable is the case of Poland, where the national association of universities established a Women's Club dedicated to empowering women in academia—albeit with a risk of equality work being compartmentalised (CS10). Another type of an indicator for a very supportive social context would be collaboration between institutions centred particularly on EDI issues—for instance, a network of public universities for equality and diversity in Spain (CS5).

Second, the distinction between very and rather supportive social contexts lies primarily in the stability and scope of inter-organisational collaboration. Project-based coalitions are typical of the latter. For example, a regional project on developing GEPs created a platform for exchange and joint strategy development across institutions (CS11). Such projects often establish Communities of Practice (CoPs), which are effective for sharing knowledge and fostering institutional change (Palmén and Müller 2023). However, once project funding ends, the sustainability of these CoPs is uncertain, as they tend to rely on the "fuel of personal motivation … rather than institutional commitment" (Mihajlović Trbovc 2023).

Beyond inter-institutional cooperation, supportive social contexts also include networks of individuals across institutions and collaborations with external stakeholders such as specialised NGOs or local authorities. Examples include national networks of equality or diversity officers, women professors, and initiatives supporting carers' success in higher education (e.g., CS7, CS9, and CS12), as well as partnerships drawing on NGO expertise in areas such as GBV and harassment (CS4 and CS11). While such networks and collaborations can facilitate institutional change, their impact depends on individuals' ability to transfer knowledge back to their home institutions and on their positionality within organisational hierarchies. Moreover, excessive reliance

on external actors risks undermining the sustainability of gender equality and EDI measures by effectively outsourcing gender equality work beyond the institution.

Feminist and other social justice movements contribute to the supportive context for gender equality and EDI change when staff and students bring those values to an academic institution through concrete initiatives. In several of our cases, the #MeToo movement reshaped institutional responses to GBV and sexual harassment, prompting a shift from informal to more structured and transparent procedures (CS4, CS8, and CS11). Often, institutional change was triggered by publicly reported harassment cases that gained media attention, reflecting a broader global trend (Gertsberg 2024). Other cases show student-led initiatives inspired by movements such as Black Lives Matter or climate activism (CS7). While impactful, such initiatives may indicate something other than a very supportive socio-political context, as their continuity may be limited by student turnover.

Third, the absence of collaborations, alliances, or coalitions advocating gender equality and EDI change signals a rather unsupportive or hindering social context. Research highlights the key importance of such alliances for institutional change (Palmén and Müller 2022) and shows that isolated equality practitioners are more likely to experience burnout (Ahmed 2017), feelings of powerlessness (Benschop and Verloo 2006), or "gender fatigue" (Kelan 2009).

Finally, a hostile social context for gender equality and EDI change is characterised by the activities of external groups or networks that are directly opposing principles of equality or advocating values which are in antagonism with gender equality and EDI causes. For instance, a Polish university developing a GEP was targeted by an ultra-conservative Catholic legal organisation and think tank, known for its anti-LGBT+ and anti-abortion activism (the university responded by producing a question & answer document articulating the evidence-based rationale for the GEP).

Cultural, political, and social context and its effects on structural change

Within the discourse on institutional change towards equality in academia, we conceptualise 'context' as the interplay of constraints and opportunities within wider society that influence change efforts within academic institutions. What emerges from our analysis is that cultural, political, and social dimensions of context do not affect institutions separately and directly but rather intersect and are filtered through the (national) higher education setting, as illustrated by Figure 8.1. The effects of the context on institutional change are varied, as institutions are not mere passive receivers of outside influence, but rather interpret, prioritise, and operationalise external constraints and opportunities within the framework of the higher education setting. In this section, we analyse how these three dimensions of context operate through the higher

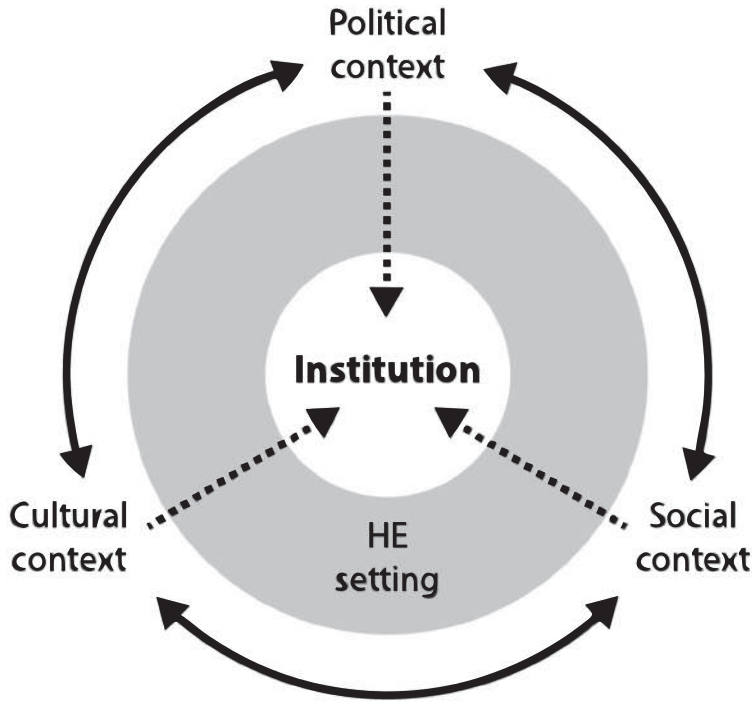


Figure 8.1 Theoretical model of three types of context (i.e., cultural, political, and social) and its impact on institutional structural change.

Source: Own elaboration.

education setting and provide concrete examples of how they shaped organisational change in institutions observed in case studies.

As shown in Figure 8.1, the higher education setting occupies a middle position between the external context and the institution. At this level, cultural norms, political priorities, and social mobilisations are mirrored or reconsidered, if not contested. This mediation is shaped by the characteristics of the contemporary neoliberal higher education setting, including its values of excellence, meritocracy, and internationalisation, as well as the economic conditions under which higher education operates.

Importantly, the three dimensions do not behave independently, but they overlap. Cultural values gain political force through social mobilisations; political priorities are legitimised or challenged through cultural norms, and social movements draw on both cultural values as well as political power dynamics. Their overlap either provides opportunities or constraints for institutional change, depending on how the forces align or contradict one another within the higher education setting.

From a perspective of cultural values, if traditional gender roles and stereotypes are prevalent, they negatively impact both the situation of female scientists and the prospects of successful structural change (Augusto et al. 2018; Diogo et al. 2021; Doneva et al. 2019; Reidl et al. 2020; Tăriceanu 2022; Zabaniotou et al. 2022). Gender-essentialist perspectives reinforce gender-differentiated labour in academia and, as such, reproduce existing gender hierarchies. In rather supportive contexts, the core academic values are negotiated with gender equality values, which means that, while both groups of values are seen as important, there is a danger of prioritising meritocracy/excellence over gender equality and EDI. This potentiality is illustrated by this case from Poland, where middle-management leaders declare commitment to gender equality, which is not their top priority (CS9). Similar to the case from the Netherlands, where despite successes in implementing gender equality measures, the genuine commitment is limited to 'safe issues,' which do not transform existing power structures (CS7). Therefore, attempts to address systemic inequalities such as biases within the university's evaluation and promotion systems are neutralised, since they challenge the well-established metric-based idea of scientific excellence. This was the case at institutions in Iceland (CS8) and Germany (CS1), where gender equality practitioners faced the argument based on the colloquial misconception that "if you take women, then we have to compromise on scientific quality" (CS1).

The political dimension shows that progressive and regressive forces often operate simultaneously, thereby constraining institutional change processes. A supportive national policy framework may coexist with political actors who contest gender equality as a political value. In such settings, equality officers and other agents of change need to manoeuvre between these contradictory agendas that exert power over institutional functioning (Sekuła et al. 2023). Moreover, the deteriorating economic conditions in research and higher education result in underfunding that seriously questions the legitimacy of gender equality work. As reported in one of the German case studies, the discontinuation of several regional gender equality programmes and the university's financial difficulties led to the de-prioritisation of EDI issues (CS1).

Suboptimal funding for gender equality and EDI efforts can also occur in otherwise favourable contexts. This is evident in Spanish universities, where regular funding for gender equality activities from local, regional, and national governments has recently declined in some regions due to financial constraints, reducing external funding and increasing competition between spending priorities (CS5).

Limiting academic autonomy can negatively affect the implementation of gender equality measures, as demonstrated by the Serbian case, where recent restrictions on managerial and financial autonomy have increased universities' dependence on the government (Stanić 2025; Tatalović 2025).

This situation has made universities less willing to engage with equality issues (CS11).

The social dimension also conditions how cultural values and political forces affect institutional change. Even where networks of supportive stakeholders exist, weak or fragmented cooperation can hinder structural transformation. This is evident in an Irish university (CS13), where trade unions have successfully advanced initiatives for improving the working conditions of precariously employed staff, a group disproportionately composed of women. Trade unions are structurally excluded from EDI-related decision-making, while this issue remains outside the broader EDI agenda.

Similarly, the influence of social justice movements on institutional change depends on the extent of their direct engagement with academia. While feminist movements can promote progressive cultural norms and influence political discourse, their impact on institutional change hinges on whether feminist actors are meaningfully included in policy processes and endowed with institutional power or instead marginalised or opposed within academic institutions.

Lastly, we need to consider the temporal and spatial aspects of context. Periods of openness may be followed by renewed resistance, while institutional change often unfolds amid ongoing symbolic struggles between progressive and regressive forces. In Poland, the change of those in power from an ultra-conservative government to a more liberal one has discursively renewed the political legitimacy ascribed to gender equality as a value. In Serbia, the trajectory has moved in the opposite direction. Although the Serbian government adopted a Law on Gender Equality in 2021, described by some scholars as part of the façade democratisation process (Zaharijević and Antonijević 2023:93), its implementation was halted in 2025 when the Constitutional Court started reviewing it, with the concept of 'gender' becoming a focal point of conservative mobilisation. This reversal affected institutional change, including GEP implementation, as the law had mandated specific gender equality measures in universities.

Neoliberal austerity involving financial cuts or attacks on academic autonomy both characterise the current state of the higher education setting in many countries. While not directly targeted at gender equality, these dynamics nonetheless undermine the structural change efforts for equality in academic institutions, rendering the context unsupportive for institutional change.

Distinguishing critical levels of cultural, political, and social context

We propose the following set of indicators based on a calibration table developed for this project (Müller et al. 2025), deriving from the literature and comparative case study analysis of the context. The indicators are clustered into three mutually interconnected dimensions that together comprise a supportive context of gender equality and EDI changes in academic institutions (see Table 8.1).

Table 8.1 Four levels of calibration thresholds and their corresponding indicators and set-membership scores for supportive cultural, political and social context

Brief description	*Indicators*	*Set-score*
Very supportive context for gender equality and EDI changes	• Progressive gender beliefs supportive of equal participation, regardless of gender, in care work, research and teaching. Active dismantling of academic hierarchies tied to gender roles. Gender stereotypes are perceived as contingent and ultimately abolishable. • Political climate values gender equality as a high-priority issue that is expressed through a robust policy framework that supports institutional change. • Systematic collaborations with groups/movements/networks outside the institutions, which are supportive of the gender equality and EDI cause.	1.0
Rather supportive context for gender equality and EDI changes	• Ambivalent gender attitudes that are nominally egalitarian (e.g., supporting equal participation in the academic labour market), but implicitly assigning gendered responsibilities in work and care, presenting it as a 'personal choice.' Lacking an agenda for proactive dismantling of gender stereotypes and hierarchies. • Gender equality and EDI principles are considered as a political value but not a priority and as such are expressed through singular policy initiatives/regulations. • Incidental collaborations (e.g., project-based, short-term, ad hoc) with external organisations/networks/movements supportive of gender equality and EDI cause.	0.67
Rather unsupportive/hindering context for gender equality and EDI changes	• Hegemonic cultural beliefs that naturalise essentialist gender attitudes (prioritising the male breadwinner model and feminising care work). The idea of equal participation in academic labour market is outweighed by stereotypes determining career (choices and) prospects. • Within the political climate, gender equality and EDI principles are competing with other political values, being sidelined or openly questioned. This is reflected in policies ambiguous towards gender equality. • Lack of groups/movements/networks outside the institutions that would be supportive of the gender equality and EDI cause.	0.33

(*Continued*)

Table 8.1 (Continued)

Brief description	*Indicators*	*Set-score*
Hostile context for gender equality and EDI changes	• Hostility towards the idea of gender equality in academia, naturalising male privilege. Cultural backlash over gender equality and EDI principles and initiatives due to conservativism, traditionalism and/or heteronormativity. • Gender equality and EDI principles are seen as a threat or openly contested within the political sphere, while gender equality and EDI policies are resisted. • Activity of external groups/movements/ networks/organisations that are against the gender equality and EDI cause (e.g., anti-gender mobilisation).	0.0

1 The *cultural dimension* captures the cultural value of gender equality, wider beliefs, attitudes, and norms about care work and employment, and resulting behaviour, societal expectations, and stereotypes.
2 The *political dimension* encompasses relevant political forces (at the national, regional, and EU levels) and discourses reflecting the value given to gender equality in political debates and social policy frameworks.
3 The *social dimension* is comprised of relevant coalitions; collaborations; alliances between representatives of institutions, or institutions as a whole; and external civil society actors and social movements.

For each of the four levels of gradation, from very supportive to the hostile context, we designed three indicators relating to each of the dimensions.

Conclusions

In this chapter, we argue that context is the most elusive and yet influential factor in shaping structural change towards gender equality in higher education institutions. Unlike more tangible elements of the institutional change process such as Enforceable Legislation (see Chapter 7) or Advanced Gender Knowledge (see Chapter 5), context tends to resist measurement and standardisation. We understand context as relational, time- and space-dependent, comprising three dimensions: cultural, political, and social. These dimensions shape the inputs and outcomes of policy implementation at an institution, but always through the lens of the higher education setting, in which an institution operates. For instance, the impact of cultural norms or political debates is always filtered through the structures and logic of a higher education system. Similarly, political opposition to gender equality and EDI principles manifests differently in higher education compared to

some other types of institutions, where such resistance may be counterbalanced by invoking the autonomy of the university. Finally, even the existence of a strong feminist movement in a country does not translate automatically into institutional change at local universities; its influence is mediated by the higher education system and becomes effective only when higher education institutions actively incorporate feminist actors into change efforts and grant them institutional power.

Through the three dimensions, we have assessed the characteristics of very supportive, rather supportive, rather unsupportive, and hostile contexts. Different levels of impact of supportive and unsupportive contexts become apparent when comparing their effects on structural change. In an ideal scenario, a supportive context consists of cultural consensus over gender equality, a political climate that values it, and strong national feminist and social justice movements. This has proved to be a fertile ground for change towards more equality in academic institutions. However, the effects of a supportive context are often fragile, as while it may be given at one point in time, this does not mean it is forever. Periods of openness to gender equality and EDI measures may be followed by phases of regression, marked by the resurgence of patriarchal cultural norms, political backlash against gender equality efforts, and the revival of neo-conservative social movements. Such a hostile context can have damaging consequences for the implementation of gender equality measures, undermining progress in ways that institutional efforts alone cannot easily counterbalance.

This chapter contributes to research on structural change towards inclusive gender equality by demonstrating the need to study such change as a contextually embedded and mediated process rather than as a linear or technical intervention. It argues for analytically factoring in the temporal and spatial situatedness of policies, the relational nature of context (as it may have different impacts on institutions within the same country), and shifts between supportive and unsupportive elements of the context over time. The indicators that we propose in this chapter for evaluating the nature of the context for institutional change towards gender equality are designed for empirically capturing and comparing contextual conditions, thus advancing qualitative comparative research that is sensitive to context-specific mechanisms of change. By foregrounding systemic comparison across institutions and national landscapes, this approach enables a more nuanced understanding of why similar institutional policy measures produce different outcomes: not because of their intrinsic quality, but because they are implemented within different and dynamically changing contexts.

Notes

1 While building on previous studies (e.g., Reidl et al. 2020), we specifically excluded from our code scheme those relating to the legislative framework relevant for gender equality measures at a university, since this aspect has been fully

covered by indicators and calibration table developed only about this issue (see Chapter 7).

2 While Chapter 6 in this book on "Communities of Change for Inclusive Gender Equality" explores groups of people *within* organisations that work collectively towards gender equality, here we focus on collaborations of *people from different organisations*, or cooperation *between organisations as such*.

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9 Comparing outcomes and impact

Career progression and prevention of gender-based violence and harassment

Jörg Müller and Lorena Pajares Sánchez

Introduction

Despite the continued investment in many structural change projects by the European Commission to advance gender equality in research performing organisations and the wealth of information these projects have generated over the years (Bozzon, Murgia, and Poggio 2018; European Commission 2025a; Ferguson 2021; Wroblewski and Palmén 2022), our knowledge of what works in which contexts has been surprisingly limited. While there has been some progress in doing comparative research on structural change for greater gender equality (Engeli and Mazur 2018, 2024; Lombardo and Meier 2022), a major roadblock persists due to the insufficient attention paid to comparing outcomes and impacts. Two factors contribute to this persistent gap: first, research is largely problem-centred. We continuously identify and describe gender inequalities, analyse their mechanisms, and catalogue policy interventions to mitigate them (Belingheri et al. 2021; Phillips, Jun, and Shakeri 2022). However, despite the importance of this work, too little attention is devoted to understanding the outcomes and impacts of policy interventions (Lau et al. 2023). As a result, we have limited knowledge of the extent to which such policies achieve their stated goals. Second, our problem-centred perspective is often combined with a neo-institutional framework to analyse change for greater gender equality in academia (Clavero and Galligan 2020). While this framework emphasises the formal and informal rules governing policy implementation, it sidelines policy outcomes and impacts, limiting possible insights, especially from a comparative perspective.

A good starting point to foreground the outcomes and impacts of equality interventions is programme evaluation approaches (Espinosa-Fajardo and Bustelo 2019; Rogers et al. 2015). Evaluations analyse the design of an intervention, the quality of the implementation process, and also the effects, that is the short-term outcomes and long-term intended and unintended impacts. However, while evaluations can clarify "what works or does not work, how, for whom, and why" (Kingsley 2020), obtained insights do not generalise well across cases and contexts. While evaluation approaches deploy different methods to trace the minute complexities of path-dependencies of

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(un)successful change, they founder on the challenges of cross-case comparison as we are often left with the insight that "there are no one-size-fits-all recipes" for structural change and empowerment (Apfelbaum, Stephens, and Reagans 2016; Cornwall 2016; Gisler et al. 2018). Without such systematic comparative work, however, we also fail to explain cross-case variation and to gain a deeper understanding of the complex mechanisms involved (Mazur and Spierings 2016).

Taking programme evaluation approaches as a starting point, this chapter contributes to developing a comparative framework for gender equality plan (GEP) outcomes and impacts by addressing some of these difficulties. Guided by the core logic of Qualitative Comparative Analysis (QCA), which aims to explain an outcome of interest by the interplay of enabling conditions, the question arises of how outcomes and impacts of gender equality interventions can be compared. As we will argue, this involves two operations. First, following similar arguments in other chapters of this book, it involves incorporating a status-based perspective in the comparison of outcomes and impacts. Transformations to the gendered value hierarchy in science are crucial for assessing the grand goal of creating a more gender-equal society. Second, we suggest moving away from analysing impacts at a global level—an entire GEP—towards defining 'success' at the level of single and specifically targeted policy interventions. Combining these two steps, we propose to integrate a status-based perspective into two sets of 'success' indicators: first, for interventions addressing career progression; and second, for interventions aiming at the prevention of gender-based violence on the other. 'Success' indicators, thereby, become both content-specific with regard to the goal of an intervention and are general with respect to affecting broader value hierarchies tied to gender.

Developing a comparative framework for gender equality plan impact

Dimensions of 'successful' transformation: power and status

Insights from the field of policy and programme evaluation caution against simple definitions of 'success.' Although the success of policies in general are linked to their thorough design, efficient execution, and 'good results,' what the latter entails more precisely is far from clear (Espinosa-Fajardo and Bustelo 2019). For example, following Hay (2012), Espinosa-Fajardo and Bustelo (2019) suggest that the objective of feminist evaluations is not to arrive at a single definition of 'success' but to give voice to different notions of knowing and, hence, different benchmarks of 'success.' Similarly, feminist political scientists Annesley and Gains (2014) maintain that defining policy outcomes for women in general is rather difficult, as women are very heterogeneous with differing needs across a spectrum of intersecting socio-demographic sub-groups. Yet, at the same time, there is a shared notion that policies for

greater gender equality, including their evaluations, aim at transforming structural inequalities and power relations (Mertens 2008; Podems 2010). Following Iris Young's (2011) definition of the three pillars of the gender system, Htun and Weldon (2010:208) locate this fundamental transformation at the level of dismantling "hierarchies of power that privilege men and the masculine, a sexual division of labour that devalues women and the feminine, and the institutionalization of normative heterosexuality." This gender transformation is the "ultimate outcome" and "gold benchmark" to measure "the extent to which gender policies have succeeded in eliminating gender and sexual hierarchies to create a more gender-just society" (Engeli and Mazur 2018:120). Although, as Cornwall (2016) argues, the dismantling of power relations constitutes an ongoing and complex process rather than a discrete or easily measurable outcome, the goal of gender indicators nevertheless consists of capturing this "gender-related change over time" (Wroblewski and Leitner 2022:38). As a benchmark, it provides critical guidance to distinguish progress and setbacks and hence make progress minimally comparable.

In order to advance towards a more specific understanding of 'success,' it is useful to remember that gender hierarchies involve two fundamental dimensions of inequality, namely the "economic structure and the status order of society" (Fraser and Honneth 2003:19). Status-based gender inequalities address the institutionalised patterns of cultural value that privilege masculinity and devalue everything associated with femininity. Resource-based inequalities are largely class-based, rooted in economic inequalities associated with wealth and power (Htun and Weldon 2010). Although status hierarchies, once developed, tend to co-occur with differences in power/wealth, this should not distract from the fact that the mechanisms to establish and sustain these types of hierarchies are different (Ridgeway and Bourg 2004). Power and wealth are rooted in the control of material resources, whose possession enables the enforcement of compliance without consent. Status, on the other hand, is rooted in cultural beliefs and, as such, is given by others, not owned; status hierarchies are, in the words of Cecilia Ridgeway (2019:15), "fully cultural in nature." While existing indicators mainly focus on resources/wealth, indicators for gendered value hierarchies are much harder to come by. Yet, as we will detail below, status-based assessments offer important complementary insights that enrich and refine power- and wealth-based measures of inequality. Only by integrating these two dimensions—addressing both status- and resource-based disparities—can outcomes and impacts be assessed in a more robust and comparable manner.

How to measure cultural value hierarchies?

Measuring resource-based inequalities is relatively easy, considering, for example, wage gaps, or gender balance in decision-making positions (European Commission 2025b). However, simple numerical indicators focusing on power/wealth have been found lacking or failing to capture these more

substantial transformations at a cultural level. The attainment of numerical parity through gender quotas in decision-making positions, for instance, does not in itself lead to the substantive dismantling of entrenched gender hierarchies (Dwivedi and Paolella 2024; Lipinsky and Wroblewski 2021; Lowndes 2020). Although women's access to decision-making positions signals more equitable access to power, it does not necessarily imply the dismantling of gendered and sexual hierarchies, for example, by addressing violence against women (Weldon 2013). While some highlight that missing gender competence is the key to real transformation (Lipinsky and Wroblewski 2021), others insist on the role of women's token status (O'Connor 2017). In either case, the deeper issue at stake is the necessity to transform gendered value hierarchies to detect 'real' versus numerical, inconsequential change. This emerges from research in Sweden where women academics have only been allowed to enter senior academic management positions "at the same time as these positions decline in status, merit and prestige" (Peterson 2016). Similarly, Monroe (Monroe et al. 2008) argues that once women become senior managers inside academia, this devalues and minimises the power dimension while foregrounding the service dimension of the position. In both cases, numerical parity did not signal a more gender-equal environment but rather a devaluation of the associated senior positions. Real change, in contrast, implies that numerical parity is accompanied by a transformation of the status hierarchy tied to gender, that is, the underlying cultural values. While numerical indicators are easy to measure, the question is, how to best measure gendered value hierarchies?

Although cultural disadvantages in terms of the lower status of women compared to men in science are not as straightforward to measure as many resource-based inequalities such as the gender gaps in grants or wages, some do exist. For example, gender gaps in prestigious awards and prizes suggest that women do not receive the same recognition as do men (Lincoln et al. 2012; Lunnemann, Jensen, and Jauffred 2019). The gender gap in awards also points to a hierarchy of scientific disciplines in which only certain disciplines, such as physics, chemistry, medicine, economics, or mathematics, are crowned with the most prestigious awards, such as the Nobel Prize or the Fields Medal, while there is no equivalent award for most social sciences or humanities (Zuckerman 1996). Using bibliometric indicators instead of awards confirms the hierarchy of sciences (Fanelli and Glänzel 2013); it is only a small step to see that women and minoritised groups are especially under-represented in high-prestige disciplines (Kulis, Sicotte, and Collins 2002). This underlines the broader pattern of devaluation tied to feminisation, also observed at the occupational level. Gender balance in these contexts is not the result of women having made progress to greater equality but simply men departing for more rewarding and prestigious sectors or industries. Commenting on Reskin and Roos' (1990) initial findings in the US, Grimshaw and Rubery (2007:130) state that "one reason why women may be able to make inroads into male-majority occupations is that they fail to attract or retain men because their relative pay has declined."

Gendered status hierarchies are pervasive, ranging from group dynamics to biased performance assessment, epistemic hierarchies, differential visibility and recognition of teaching vs. research activities, to country-level innovation profiles (Carrigan, Quinn, and Riskin 2011; Fanelli and Glänzel 2013; Guarino and Borden 2017). However, in order to incorporate these value hierarchies into outcome and impact assessments, they need to be tailored and measured in the context of the specific policy interventions they address.

Towards an intervention and status-based theory of change

A broader agreement on the need for transforming gendered hierarchies as the overarching equality goals is not easily upheld in the face of diverse practical needs and diverse equality policies. Although the long-term, overall equality goal is clear, gender itself is a complex and transversal issue that cannot be addressed in any simple way. The difficulty lies now in articulating context-specific interventions without neglecting the overarching goals of dismantling power and status hierarchies.

Unpacking comprehensive policy bundles such as GEPs is a crucial first step, as this disaggregation, "reveals the variation in causal processes that are obscured when one considers gender policy as a single category" (Htun and Weldon 2010:208). As evidenced by the INSPIRE case studies, GEPs exist in parallel to other policy documents, including anti-discrimination, diversity frameworks, or action plans and protocols against harassment. GEPs address very different thematic areas which differ by outcome and impact: fair recruitment and career progression, for example, is about tackling vertical and horizontal segregation, while the integration of sex- and gender-based analysis operates largely on the level of research methods, curriculum design, and pedagogy. As scholars of programme evaluation have pointed out, a 'theory of change' is crucial in this respect, as it articulates a logical model of how certain measures lead to expected outcomes that address specific needs (Wroblewski and Leitner 2022). This implies an analysis of the central processes by which change is expected to come about for the organisation or target group. A theory of change hence disaggregates diverse gender issues, exposing how each of these "involves a distinct set of actors, activates different cleavages and conflicts, and has distinct implications for gender relations" (Htun and Weldon 2010:208). While this disaggregation reveals the "causal processes that are obscured when one considers gender policy as a single category" (Htun and Weldon 2010:208), it often loses sight of the bigger picture: the necessity of transforming both gendered power *and* status hierarchies. In what follows, we develop two examples of how to combine status- and resource-based inequalities to better assess and ultimately compare the 'success' of interventions for career progression and the prevention of gender-based violence.

Distinguishing critical levels of career advancement and the prevention of gender-based violence

Recruitment and career progression

Vertical segregation remains one of the most persistent gender inequalities in science, characterised by a decreasing proportion of women at higher career stages. According to the 2025 edition of the She Figures, gender gaps in career progression and imbalances at various career stages differ across disciplines and countries (European Commission 2025b). An extensive literature has analysed the nature of this issue and developed a comprehensive catalogue of interventions to address it (Hunt 2016; Kossek, Su, and Wu 2017; National Academies of Sciences, Engineering, and Medicine 2020; Seibert, Akkermans, and Liu 2024). These interventions typically include measures to balance work and private life, to revise scientific excellence, promotion and evaluation criteria, to introduce work allocation models, to valorise pastoral/care work, to install strong mentoring and supervisor support, or to guarantee a fairer redistribution of teaching and service work, among others (see also Chapter 5). From a comparative, outcome- and impact-oriented perspective, gauging the 'success' of these interventions should be straightforward by determining the extent to which they succeed in closing the gender gap in career progression. Having achieved gender balance at Grade A professorship level, for example, would indicate gender equality in career progression (Drange et al. 2023). However, bearing in mind the limitations of too-simple numeric indicator relations as previously argued (Liebowitz and Zwingel 2014; Merry 2016), several caveats are in place to construct a more valid comparative indicator of transformed gender hierarchies for a fairer career progression at the organisational level.

First, absolute counts need to be replaced with relative promotion rates along the career pipeline. Calculating the percentage drop from one career stage to the next provides a first notion of how strongly the academic pipeline leaks (Berryman 1983). These indicators ideally consider the extent to which degree gender-balanced promotion is the result of (stalled) internal promotion within the organisation, the hiring of new talent from outside, and academic staff leaving the organisation, for example, due to retirement (Greska 2023). This logic underlies most indicators used in this area and is promoted through corresponding interventions such as the flexible cascade model for recruitment and promotion (HEA 2018; Wallon, Bendiscioli, and Garfinkel 2015).

However, as previously argued, to what extent do these equal promotion rates (a non-leaky pipeline) indicate a substantial transformation of the gender hierarchy? On the resource side, an indicator of fair career progression should capture equal promotion for equal effort, thus integrating into its conceptualisation the difference between equity and equality. As highlighted in the literature, there is evidence that women have to perform better

(academically) compared to their male colleagues to reach similar benefits, including promotion (Sandström and Hällsten 2007; Wenneras and Wold 1997). Equitable access to resources is important, for example, in terms of money to hire substitute teachers and engage in the bureaucratic and extremely time-consuming process of a promotion application (Drake and Svenkerud 2024). This has implications for the academic age when promotion is reached. Women and men at the same career stage should have a similar academic age.[1] In addition, precarious working conditions affect women and men early-career researchers differently and need to be considered (Murgia and Poggio 2018). Indicators on differences in workload allocation, including differences in working hours between women and men, contribute to a better assessment of equal promotion for equal effort (Kalpazidou Schmidt and Bührer 2017:170).

Concerning fair career progression from a status-based perspective, important additional qualifications are in place. Gender balance promotion is a sign of substantial transformation to the degree that it occurs in high-status scientific disciplines, prestigious organisations or countries with a strong innovation profile. As Kulis, Sicotte, and Collins (2002:666) observed, women and minoritised groups are especially under-represented in "prestigious, research-oriented departments in fields where large grants are highly prized and common." As our case studies have shown, sectors that are more teaching oriented and less research intensive have flatter professional hierarchies and are hence less differentiated in terms of associates' status profiles, making it easier for both women and men to achieve equal promotion rates. This pattern of devaluation tied to feminisation also holds at the country level, where many Eastern European countries with lower R&D expenditure and smaller 'honeypots' have higher proportions of women researchers (European Commission 2003, 2008). Countries such as Romania, Latvia, Croatia, and Lithuania, which have a moderate innovation profile, are among the few countries within Europe with gender-balanced R4 positions (European Commission 2025b).

Thus, a more solid indicator of transformed gender hierarchies for career progression would not only use balanced promotion rates but also consider related status hierarchies. Positive change towards greater gender equality in career progression is mainly apparent in those countries, disciplines, and sectors that enjoy high status and yet have achieved gender-balanced progression rates across all career stages. This applies especially for achieving gender balance at the highest academic positions (Grade A/R4) with the highest status and, hence, the largest gender gap attached. Based on this consideration, Table 9.1 distinguishes six critical levels to compare outcomes/impact with regard to fair career progression. Calibration scores close to 1 indicate substantial transformation of power and status-based gender hierarchies. Scores below 0.5 and/or closer to 0 indicate the persistence of traditional power and status-based hierarchies.

Table 9.1 Six levels of calibration thresholds and their corresponding indicators and set-membership scores for 'Gender-fair Career Progression'

Brief description	*Indicators*	*Set-score*

Gender-balanced career progression that reflects substantial transformation of power/status relations	Cascade career progression up to *senior level in high-status* contexts
	• Gender-balanced career progression at senior level (highest level from Grade B to Grade A)
	• High-status context:
	  • scientific disciplinary context (male-dominated)
	  • organisational context (research-intensive)
	  • national context (innovation leader)
	• Equal working conditions: equal advancement for equal effort
		1.0

Gender-balanced career progression that reflects some transformation of power/status relations	Cascade career progression up to *mid-career level in high-status* context • Gender-balanced career progression at early- and mid-career (i.e., PhD to Grade B) • High-status context (see above) • Equal working conditions	0.8

Gender-balanced career progression that reflects minor transformation of power/status relations	Cascade career progression up to *senior level in low-status* context
	• Gender-balanced career progression at senior level (highest level from Grade B to Grade A)
	• Low-status context:
	  • scientific disciplinary context (i.e., female-dominated)
	  • organisational context (i.e., teaching-intensive)
	  • national context (innovation follower)
	• Equal working conditions: equal advancement for equal effort
		0.6

Leaky pipeline that reflects minor changes to resource/status-based inequalities	Leaky pipeline at the senior level in low-status context • Leaky pipeline at senior level (highest level from Grade B to Grade A) • Low-status context (see above) • Equal working conditions	0.4
Leaky pipeline, that reflects some resource/status-based inequalities and power relations	Leaky pipeline at early/mid-career level in high status • Leaky pipeline at senior level (highest level from Grade B to Grade A) • Low-status context (see above) • Unequal working conditions	0.2
Leaky pipeline reflecting entrenched resource/status-based gender inequalities	Leaky pipeline at early/mid-career in low-status context	0.0

Prevention of gender-based violence, including sexual harassment

Gender-based violence, including sexual harassment, has been largely seen as a pervasive, silenced, complex, and intractable global epidemic pervading all strands of life (Bondestam and Lundqvist 2020; Dey, Shannon, and Quirk 2025; O'Connor et al. 2021). Recent policy developments, however, suggest an increasing concern about the issue. At the European level, we count on a Zero-Tolerance Code of Conduct (European Commission 2024), and Horizon Europe eligibility criteria include 'measures against gender-based violence, including sexual harassment' amongst the recommended thematic areas to be addressed by GEPs (European Commission 2021). Additionally, feminist movements increasingly demand action, bringing the issue into the spotlight (Charlotta et al. 2025). Nevertheless, the largest prevalence survey conducted in the European R&I ecosystem to date reveals that almost two in three respondents had experienced instances of GBV in their academic and research institutions, but only 13% reported it (Lipinsky et al. 2022), exposing the failure of institutions to address the problem (European Commission 2024). Moreover, sexual harassment is still concealed, successful interventions remain scarce, and their implementation is still a challenge despite comprehensive policy frameworks (Lipinsky et al. 2025; Peláez 2024; Simonsson et al. 2024). All of this exposes the need to redefine what success means in this context and unveils the far-reaching linkages between power structures and the perpetuation of violence, tied to the more symbolic dimension of institutional change.

This symbolic dimension and its structural supporting (and silencing) dynamics make GBV substantially different to other action areas addressed by GEPs, like career progression. Although power dynamics underlie all areas of gender inequalities, gender-based violence, harassment and other forms of violence are especially hard to detect. What is needed, therefore, is a first solid indicator of prevalence rates that are sensitive and integrate the associated status-based hierarchies. Several caveats come into play here. The first one deals with the limitations of quantitative approaches. Extensive research shows that low numbers do not mean low incidence. The second one deals with an intersectional understanding of the phenomenon. Recent studies reflect that minority ethnic groups or people with disabilities are more likely to experience discrimination and present a higher prevalence of all forms of gender-based violence (European Commission 2022; Humbert et al. 2022; Lipinsky et al. 2025). Hence, prevalence measurements should capture how experiences of harassment differ depending on intersectional determinants. The third consideration deals with the indicator's ability to unpack the underlying power relations by capturing the role of perpetrators and institutions. While there is a growing number of prevalence studies focused on victim-survivors' experiences, the perspectives of perpetrators and the ramifications for the broader work environment are usually missing (Bondestam and Lundqvist 2020; Ranea-Triviño et al. 2022). On top of

that, some organisational features exacerbate the problem, like gendered and hierarchical structures, or non-egalitarian and neoliberal cultures with high reliance on precarious forms of employment (Humbert et al. 2022). Thus, to successfully prevent gender-based violence and sexual harassment in academic contexts, it is crucial to comprehend how incidents—as well as their disclosure and handling of complaints—relate to the exercising of power relations (Ahmed 2021; O'Connor et al. 2021). Yet, quantitative studies tend to leave out contextual information that is needed to interpret prevalence rates (Schredl, Lipinsky, and Humbert 2025). In this sense, indicators should not only capture declared prevalence but also reflect organisational and structural dynamics, allowing multilevel intersectional approaches to GBV (Hearn et al. 2025).

By taking into consideration these contextual determinants, the path-dependencies between manifestations of violence and organisational features are acknowledged, along with the interconnected nature of action areas. In this regard, prevalence mechanisms can provide insights on how different forms of GBV and harassment are associated with detrimental consequences for work and studies, affecting academic and career progression (European Commission 2024; Humbert et al. 2022). Also, they show how hyper-competitive work and study environments—characterised by precarity, unbalanced power relations, and high levels of dependency for career progression—can fuel the existence of gender-based violence and harassment (O'Connor et al. 2021).

Beyond providing consistent prevalence frameworks, indicators of success in preventing GBV should reflect the extent to which victims' needs are met. On the side of status-based hierarchies to be addressed in this regard, it is crucial to secure the trust of minoritised groups, including encouraging disclosure of experiences of discrimination (European Commission 2022). Such disclosure can be encouraged through "speak-out" mechanisms, and trust supported with "naming" policies as part of a longer transformative justice process, as suggested by Adrija Dey and colleagues (2025). These authors stress how speaking out and/or naming (under specific conditions) gives voice to people who are silenced in mainstream narratives. Ultimately, speak-out campaigns and procedures promote accountability and help to frame vulnerabilities and harassment as structural issues, contributing to ensuring that the focus is not shifted away from how institutional policies, processes, and norms support the perpetuation of inequalities (Lipinsky et al. 2025). They can also shed light on the networks of silence and related silencing mechanisms that uphold status-based hierarchies (Lipinsky et al. 2025; Peláez 2024; Pilinkaitė Sotirovič et al. 2024).

Alongside, systems to manage complaints need to be revised, given that only a small proportion of all sexual harassment is reported formally (Bondestam and Lundqvist 2020; Pilinkaitė Sotirovič et al. 2024). While acknowledging that a higher level of complaints is not *per se* an indicator of success, reporting mechanisms, including formal and informal ones, and complaint-handling systems should be in place, as they contribute to

challenging power dependencies, thereby giving choice and voice to the victimised person, restoring their agency or removing their epistemic uncertainty (Ahmed 2021; Pilinkaitė Sotirovič et al. 2024). Further, it has been noted how peer-to-peer mechanisms contribute to a more impactful and caring disclosure, either through formats like complaint collectives (Ahmed 2021) or through peer support between people with experiences of sexual harassment that creates validating, safe and dependable spaces (Charlotta et al. 2025).

In discussing support mechanisms, we enter the realm of resources. Indicators here should provide evidence of the level of institutional commitment to a zero-tolerance victim-centred approach, demonstrated through the provision of specialised services and equal access to resources by all victims/survivors. Two main observations need to be made here. First, considering knowledge and information as primary resources. It implies taking a public stand against gender-based violence and sexual harassment and includes guaranteeing comprehensive, easily and permanently available information about what sexual harassment is and what policies, procedures, and services are in place. It also requires that all groups, both victims and survivors, bystanders, and service providers, know how to respond appropriately when it occurs. Information should also contribute to enabling discussion, reflection and learning on the topic (Charlotta et al. 2025). This is important because just counting on punctual awareness-raising or information campaigns might not necessarily lead to a successful prevention of violence. In fact, as stressed by the European Commission (2022), these types of interventions can become performative or procedural unless they are also linked to substantive changes in organisational practices and cultures.

The second observation deals with redistribution and understands resources in terms of specialised services and support structures. Here indicators should capture not only their existence but also the differences, if any, in the access and level of use of those resources from an intersectional lens. They should also capture practical aspects like how partnerships and relations amongst key service providers are facilitated, supported, recognised or otherwise hindered, as research shows that much of the effectiveness of institutional responses to harassment hinges on these aspects (Ranea-Triviño et al. 2022). Further, the presence of class-related inequalities should be considered regarding for how long support mechanisms are available and for whom. Long-term interventions have a more effective impact (Charlotta et al. 2025) yet seem to be seldom available or not accessible for all groups (Ranea-Triviño et al. 2022). What's more, support structures should also respond to the care demands of those providing care, thus ensuring that the whole chain of institutional responses is coherent (Simonsson et al. 2024).

Last, to prevent that complaints are stifled by bureaucracy or undergo an 'institutionally structured death' by non-receptive reviews (Ahmed 2021), protective and precautionary procedures should be activated as soon as they are filed. This contributes to reinforcing the indicators' ability to capture shifts in power structures, as it strengthens trust in the institutional response.

Altogether, and acknowledging that there are no linear movements towards progress (Ranea-Triviño et al. 2022), successful interventions would combine action at micro, meso, and macro levels. Response options must be victim-survivor-centred and trauma-informed, designed under intersectional frameworks and focused on systemic change of power relations rather than only awareness-raising or purely punitive responses (Dey et al. 2025). And measurement should incorporate emerging forms of violence and organisational dynamics (Hearn et al. 2025), moving away from the traditional success measure based on quantitative case-reporting indicators.

Based upon this discussion of gender-based violence and its inherent difficulty to measure it, Table 9.2 distinguishes six critical levels and their corresponding indicators, ranging from high-level impact capture by a 'zero-tolerance' culture (set-score 1.0) towards a low/no-impact culture (set-score 0), ruled by entrenched power relations and a 'law of silence.'

Table 9.2 Six levels of calibration thresholds and their corresponding indicators and set-membership scores for outcomes/impact of prevention of gender-based violence

Brief description	*Indicators*	*Set-score*
Zero-tolerance culture at all levels with a high level of reporting and trust in the institution	Victim-centred protocol in place and: • Regular systemic qualitative prevalence studies covering all forms of GBV and contextual information that allows intersectional analysis. • (Used) Speak-out mechanisms and campaigns. • (Trusted) Caring and clear complaints-management systems. • Equal access to a coherent chain of long-term specialised support (those providing care are also supported). • Protection and precautionary measures promptly applied. • High levels of perceived safety.	1.0
Zero-tolerance culture with positive evolution of cases reported and properly addressed and growing levels of trust	Victim-centred protocol in place and: • Regular monitoring of enquiries, complaints, and case resolution. Some qualitative prevalence measurement but weak contextual and intersectional information. • (Relatively used) Speak-out mechanisms and campaigns. • (Trusted) Complaint-management systems. • Equal long-term access to specialised support services. • Protection and precautionary measures normally applied. • High levels of perceived safety.	0.8

(*Continued*)

Table 9.2 (Continued)

Brief description	*Indicators*	*Set-score*
Emerging zero-tolerance culture	Protocol in place with: • Data monitoring of reported cases, but poor qualitative prevalence measures with no intersectional perspective. • Some awareness-raising/information campaigns. • Some (relatively used) provision of services supported with partnerships. • Inconsistent levels of protection and/or precautionary measures. • Relative perception of safety and trust in institutional response.	0.6
Fear of retaliation or lack of trust in effective institutional action hinders reporting	Some policies/measures are in place, but bureaucracy hinders a victim-centred approach: • Weak data monitoring. Prevalence not measured. • Scattered information and awareness-raising activities. • Insufficient protection and provision of services. • No precautionary measures or not effectively applied. • Low levels of trust and perceived safety.	0.4
Masculine and silence culture prevents reporting and uses 'prestige' arguments to avoid action	No protocol or policy, but uncoordinated action leading to double victimisation; • Prevalence not measured. • Scattered information activities. • Lack of protection, provision of services and precautionary measures. • Lack of trust in institutional response.	0.2
'Law of silence' imposed by entrenched power relations	Cases are not reported nor addressed.	0.0

Conclusions

GEPs are widely, if not the most widely, used policy instrument in Europe to transform research performing organisations (RPOs) towards more inclusive and gender-equal organisations. The fact that we know so little about their actual impact confirms that research on gender policies lacks recognition. To which degree gender policies achieve what they promise is of little interest to those in power within academia. As this chapter has argued, understanding the outcomes and impact of equality interventions on a comparative level requires defining more precisely how interventions affect not only power imbalances but also transform the cultural value hierarchies linked to gender.

Nowhere is this more clearly visible as in relation to combatting gender-based violence, where the goal is to achieve a genuine zero-tolerance culture which is not only about the existence of protocols or campaigns but also about their lived impact on *organisational culture and practices*. It requires lived experiences of safety, trusted complaint mechanisms, and effective application of sanctions. If greater gender equality involves a shift of cultural values, as described many times across our 14 GEP impact case studies, we need to develop indicators that measure the status-dimension of gender. Importantly, to the same degree that resource/power-based indicators are specific to intervention areas (e.g., wage gap, decision-making), status-based indicators need to capture the value hierarchies implied in different gender inequalities (e.g., disciplines, research activities). Whereas in the past, too-simple, reductionist numerical 'success' indicators were replaced by policy implementation indicators, going forward, we suggest that implementation needs to be complemented with a focus on outcomes and impacts in terms of transforming the cultural value hierarchies tied to gender.

Note

1 According to the MORE 4 Survey, women are on average younger than their male colleagues on higher career stages. For example, at R4, the average age for women is 53.7 years and 57.04 for men. This is not the academic age, but still, unexpected.

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10 From research to practice through co-creation

From GEP success factors to diagnostic tool development

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Introduction

Collaborative research methods for bridging research and practice and thus creating knowledge and tools with and for communities in order to create organisational change, are a keystone of feminist research (Bleijenbergh 2018; Burman 2016). Indeed, taking an intersectional (Cho, Crenshaw, and McCall 2013; Verloo 2006) and decolonial theoretical framework which centres epistemological justice and prioritises other ways of knowing, rather than academically produced knowledge (Chaves and Benschop 2023; Chaves Pérez and Benschop 2025) forms a major part of our work. This is founded on the notion that research must include collaborative partnerships and collaborative learning with practitioners who do the day-in, day-out "dirty work" (Ahmed 2017:94) of pushing towards more diverse, equitable, and inclusive universities across Europe.

As such, the co-creation workshops (Palmén and Müller 2022; Thomson and Rabsch 2021; van Western and van Dijk 2015) were designed to bring together both researchers and practitioners (as Community of Practice [CoP] members) in recognition of the important role that practitioners play as essential contributors with their own important and intimate 'practice-based' knowledge of how to push forward and negotiate equality, diversity and inclusion interventions within their own organisations. Here, we draw upon the recent literature about co-creation activities, which can be defined as activities or "practices where actors engage collaboratively […] through interactions within a specific social context" (Frow et al. 2015:26; Thomson and Rabsch 2021:64). In this way, we understand co-creation as a concept that allows us to "collaborate, create together, cooperate, and share ideas, knowledge, practice, and build on the existing ideas to develop them further" (Frow et al. 2015:26; Thomson and Rabsch 2021:64). In order to co-create knowledge and share ideas together with CoP members, we designed and held four thematic co-creation workshops between summer 2024 and summer 2025.

In this chapter, we specifically chart the process of a co-creation workshop between researchers and practitioners from our CoPs that was held in

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order to translate research results regarding gender equality plan (GEP) success factors into an effective practice-driven diagnostic tool for change. The co-creation workshop that we report on was a part of the wider series of four workshops that were specifically designed to effectively translate the empirical research results into practical tools for organisational change. Thus, the primary objective of the workshop was to facilitate a space where CoP members could give feedback on the indicators that were developed on the basis of the empirical research. We aimed to ensure these indicators were relevant for practitioners, and therefore we specifically elicited feedback regarding the degree to which the absence/presence of these indicators corresponded with experiential progress towards enhanced gender equality (GE) within the practitioners' respective organisations. As such, this chapter describes the co-creation methods and elaborates on the results of the workshop in relation to the six factors of GEP success which were preliminarily described in INSPIRE's D4.4 report on co-creation activities (Occhino et al. 2025). Specifically, we describe and reflect upon the co-creation collaborative process, and we also describe the diagnostic tool as the key outcome developed as a partial result of this workshop.

Co-creation methods

Co-creation workshops, designed to foster collaborative knowledge sharing between researchers and CoP members, were held between 2024 and 2025 on the following four topics: (1) the INSPIRE vision, (2) GEP success, (3) Intersectionality, and (4) Innovation Policy Toolkit. Members of INSPIRE's CoPs, both researchers and practitioners working on diversity, equity, inclusion, and GEPs in research and higher education from our four Knowledge and Support Hubs (KSH) were invited to the event. A total of 33 people participated in this co-creation workshop on GEP success factors and indicators. Over 14 countries across Europe, as well as the United States and Argentina, were represented. However, besides the Argentinian partner at FLACSO and the RMEIM CoP leader (the latter a CoP which has partners across the Mediterranean and Middle East), most of the participants at the workshop represented European countries.

Regarding the workshop structure, the lead researcher of this task started the workshop with a brief presentation outlining the six GEP success factors for impact/change derived from INSPIRE's case studies. These are (1) Strategic Organisational Commitment, (2) Comprehensive Data for Equalities Decision-making, (3) Advanced Gender Knowledge, (4) Communities of Change, (5) Enforceable Legislation, and (6) Supportive Context.[1]

After the presentation, in a co-creative, interactive session, participants joined breakout groups on Zoom, where they were asked to discuss and consensually place the indicators on a continuum scale on a MIRO board where the Y-axis represented perceived importance, from "very important" to "least important," and the X-axis represented the perceived degree to which the

indicator contributes to "deep structural change/success" to "absence/lack of item contributes to the status quo, no change, or even backlash" (screenshots of all MIRO board results are available in Occhino et al. 2025).

Participants were asked to discuss the indicators on the sticky notes and place them on the MIRO graph according to their experiences. Additionally, participants were also given blank post-it notes (coloured indigo) where they could identify missing indicators. During the placement process, researchers from the case studies facilitated discussions about how well the indicators captured both the power to drive organisational change towards greater GE and the extent to which equality practices were embedded within the organisation.

After the breakout sessions, each group's rapporteur shared their feedback in a plenary session, leading to a broader discussion about the six factors and relevant indicators.

Co-creation results: from the evidence base to tool development

In the following section, we thematically explore the feedback and group discussions that took place for each indicator, including discussions on how and to what degree the indicators could be validated in the co-creation sessions, as well as which indicators were flagged as problematic or altogether missing. As each discussion on the factors and relevant indicators was rich and complex, we have chosen to divide the presentation of results and the discussion into thematic sections dedicated to each factor. It is notable that, with the exception of Group 1, all groups chose to have each participant in a breakout group individually place a post-it for each indicator on the MIRO board. However, Group 1 decided to collectively discuss the indicators and reached a shared agreement on their placement.

Strategic Organisational Commitment

The feedback on the GEP success factor, Strategic Organisational Commitment, reflected a range of experiences with its practical implementation. Among the three participants in the break-out discussion, only one indicated that the proposed indicators had been extensively applied within their organisation. The remaining two participants reported that their institutions were either in the early stages of implementation or facing significant challenges due to insufficient top-management support; one participant even characterised their work as a "lone-warrior" effort. These accounts suggest that, while the indicators capture essential components of organisational change, such changes are not necessarily straightforward, visible, or consistently embedded across institutions.

A significant gap identified in the feedback was the ability to align GE needs with other organisational priorities. The integration of GE with other pressing issues was seen as a productive strategy for driving change, suggesting

that GE efforts might be more successful if they are framed within the broader organisational context. Additionally, the issue of legislation was raised, with participants highlighting that legal requirements or policy recommendations could become a "burden" if there are insufficient resources available to support their implementation. This points to the need for adequate resourcing to ensure that legal compliance does not overwhelm organisations.

It is notable that the two indicators that were categorised as both being very important and whose absence contributes to reinforcing the status quo, no change or even backlash were those that had to do with the role of university leadership: namely, the indicator categorised as most important being the "Vice President of gender equality or EDI" followed by the "accountability of top leadership for gender equality and/ or EDI." This suggests that the most important interventions related to strategic commitment here are linked to and depend on power within university leadership and decision-making. On the other hand, it is also notable that training activities were mentioned as making a relatively small contribution to the GEP success factor. While training is a necessary component, the feedback suggests that more robust or impactful initiatives may be needed to drive significant change in organisational commitment to GE.

Finally, it is notable that two of the indicators ("gender equality and EDI officers participate with voice and vote in top leadership decision-making"; "dedicated recourses") were unable to be discussed due to time constraints.

Comprehensive Data for Equalities Decision-Making

The feedback for the factor Comprehensive Data for Equalities Decision-making varied widely yet was rich. Indeed, due to the participants' different experiences with the factor, responses varied greatly, especially in regard to the degree to which certain indicators contributed positively to deep structural change/success or adversely whether their absence contributed to maintaining the status quo, no change or even backlash. However, it is notable that the group largely agreed that all the indicators were of some importance, even though perceived degrees of importance varied slightly. All but one indicator was placed at or above the baseline (with only one group member locating one indicator "existence of data expert group" as below neutral on the Y-axis).

Looking more specifically at the feedback on the individual indicators, the two indicators that group members identified as being the most important for GE and EDI work were "periodic systematic data collection" and "monitoring framework in place tied to GE goals/targets." Interestingly, an absence or lack of data collection was perceived to have a negative effect or a stagnation of GE efforts, while participants experienced monitoring frameworks as contributing positively to deep structural change. In terms of the indicators regarding "evaluation of progress made on tackling inequalities," and "data systematically feeds into decision-making" group members had split

opinions regarding both the importance of these factors as well as their effect on contributing to organisational change. The indicator on the "existence of data expert group" was ranked more similarly in terms of contributing to positive change; however, opinions contrasted more regarding the importance of them to organisations.

Finally, and importantly, the group discussions provided two new indicators on the indigo write-in post-it notes which had not come out of the case-study research: (1) tailored/context-specific data collection processes and (2) transparent/real-time data dashboards. These new contributions highlight the importance of co-creation processes in knowledge production, as they provide additional insight into the factor.

Advanced Gender Knowledge

The GEP success factor Advanced Gender Knowledge generated diverse interpretations and discussions among participants, particularly in relation to the indicators and their implications for organisational transformation. A central concern that emerged was the perceived abstraction of several indicators, coupled with uncertainty about how to interpret the evaluation board. Participants engaged with the board from differing analytical standpoints: some assessed the indicators according to their presence or absence within their institution, while others evaluated them based on their perceived contribution to institutional change. This divergence in interpretive approaches resulted in varying understandings and occasionally impeded the coherence and clarity of the discussion.

Indeed, several specific indicators were highlighted as ambiguous and inaccessible for participants, proving to be quite problematic. Specifically, the indicator regarding "state-of-the-art knowledge feeding GEP design" proved to be particularly ambiguous, as the term 'state of the art' was commonly interpreted by participants as synonymous with "diagnosis" or "state of play," and not necessarily with knowledge production. Consequently, most participants placed it in the category of present and contributing to a better GEP design, though this interpretation shifted only after clarification of the intended meaning. Similarly, confusion arose around the distinction between "scientific" and "administrative" criteria, with participants struggling to grasp the implications of this differentiation. The factor on the "rationale of GEP and scope" was also noted for its vague formulation, which led to varying interpretations and added complexity to the discussion. Much of the session was dedicated to clarifying these issues, which unfortunately reduced the time available for more in-depth dialogue and affected the overall outcomes of the discussion as well as placement of the indicators.

Other key points of the conversation revolved around differing perceptions of the importance of certain indicators. For example, the indicator on "gender equality (GE) becoming a criterion for decision-making" sparked discussions with contrasting views. While some participants viewed it as a

strategic priority that should be at the core of institutional decision-making, others argued that shifting mindsets was more crucial than formal criteria, the latter of which they believed could remain superficial and fail to challenge the status quo. Although all participants acknowledged the importance of the other indicators, most agreed that they were still lacking in their institutions, which positioned them as high-standard goals yet to be fully realised.

The training indicator was particularly contentious due to its broad scope. Participants suggested that it should be separated by target groups (e.g., senior staff, junior staff, and students) and content areas (e.g., training on gender-based violence and unconscious biases) to ensure that it more effectively addresses the specific needs of different organisational levels. While all participants' organisations reported having some form of GE training, it was generally not compulsory and rarely targeted senior staff or decision-makers. This lack of engagement from top leadership was seen as a major barrier to meaningful change, with many participants expressing concern that such training had minimal impact on shifting entrenched power structures or disrupting the status quo. Thus, the feedback highlights both the potential and limitations of the Advanced Gender Knowledge indicators in driving substantial, long-term institutional change towards GE.

Inclusive Communities of Change

Interestingly, the GEP success factor Inclusive Communities of Change had all of its indicators largely validated as important, as well as contributing positively to deep structural change/success. With the exception of one participant—who questioned the relevance of the indicator stating that "all/most stakeholder groups are involved in or represented in the change process"—all indicators were affirmed by the group. It is nevertheless important to highlight that the discussion centred almost exclusively on two indicators: the involvement of men in GE/EDI work and the formal recognition of GE/EDI activities (e.g., through compensation, career advancement, or reduced teaching loads). Therefore, the workshop generated relatively limited input regarding the remaining four indicators.

Of the two indicators thoroughly discussed, "Men are involved in GE/EDI work" highlighted the importance of engaging men in GE initiatives, particularly given their positions of power in key organisational roles. Participants agreed that it is difficult to advance GE without the inclusion of men, as they often serve as crucial allies in driving institutional change. However, while intrinsic and extrinsic motivations for men's involvement were acknowledged, there were still significant resistances, both institutional and societal. It was noted that men often think of GE as a "women's issue," which limits their engagement in the broader agenda. Interestingly, while some men are active in these initiatives, their participation tends to be non-systematic, with the same individuals taking on leadership roles repeatedly. There was also an important distinction made between men who actively engage in GE efforts

because they are feminists and those who participate out of obligation or external pressure. This points to a critical gap: while some men are key players in the process, their involvement alone is insufficient, and a more systematic and widespread inclusion of men is needed to create lasting change.

The second well-discussed indicator "gender equality and EDI work is formalised and recognised," reflected the ongoing challenges in institutionalising GE efforts. While participants agreed that GE and EDI work had been formally integrated into their organisations, it was often characterised as voluntary, without adequate compensation, recognition, or merit. There was a widespread perception that such work was undervalued, with no clear financial or career rewards associated with it. Particularly within academic institutions, the lack of financial support for GE initiatives was seen as a significant barrier, with many participants reporting resistance when it came to dedicating budgetary resources, particularly those that would support staff engagement. Furthermore, the work of promoting GE was often invisible, with staff resources being limited and individuals performing GE tasks in addition to their regular responsibilities. These tasks were not always formally recognised or included in role descriptions, and their visibility within the organisational structure was minimal. In most cases, it was primarily academic and administrative staff who engaged with EDI work, further underscoring the lack of systemic integration of GE efforts across different institutional levels.

Together, these discussions highlight significant challenges in building an inclusive community of change agents within institutions. While the involvement of men and the formal recognition of GE work are essential for driving progress, both remain insufficiently institutionalised and often face resistance at various levels. There is a clear need for more systematic, widespread inclusion of men in GE initiatives, alongside better recognition, support, and resources for those engaging in this critical work.

Enforceable Legislation

In the discussion on the GEP success factor Enforceable Legislation, participants expressed widely differing views regarding the relevance of each indicator within their organisational contexts and the extent to which these indicators contributed to success, maintained the status quo, or even generated backlash. Notably, this session produced a larger number of indicators classified as less important or not important at all compared to the assessment of indicators in the previous four groups. It is particularly striking that the two indicators considered most important—and as contributing most strongly to deep structural change—were not among the five originally derived from the case-study work. Instead, they were additional indicators introduced by participants: "policies of the organization" and "gender equality and EDI policy in the institution." This suggests that institution-specific policy frameworks were perceived as more influential than national-level

legislation. Nonetheless, the two indicators directly linked to national legislation—"presence of comprehensive and progressive national legislation and policies (resources and status)" and "legislation specifies organisational GE/EDI thematic content and process elements"—were identified as the next most important by three of the four participants. Interestingly, the indicator "academic freedom undermining equality work" was unanimously regarded as unimportant and as contributing to the maintenance of the status quo, lack of change, or even backlash.

Supportive Context

The GEP success factor Supportive Context was widely perceived by participants as a particularly complex and difficult dimension to evaluate, especially when applying standardised methodologies or metrics. Participants stressed that external dynamics, such as hostile backlash manifested through funding cuts or the rise of anti-progressive discourse, exert disproportionate influence on the implementation of GE initiatives. Although the six indicators primarily reflected positive achievements, they did not sufficiently capture the negative societal pressures and forms of resistance that shape real-world policy implementation. This highlights a broader recognition that social change is non-linear, unfolding through a dynamic interplay of progress and resistance, where advancements are frequently accompanied by counter-movements. Consequently, the indicators fell short of accounting for this cyclical character of social change, making it challenging to fully appreciate the scope of obstacles organisations encounter when seeking to institutionalise GE practices.

While formal structures, such as GEPs, are often in place, participants noted that these are frequently ineffectively implemented. There is a marked gap between organisational aspirations—sometimes framed as "wishful thinking"—and the tangible outcomes achieved. Cultural attitudes, which are far slower to change than organisational policies, play a crucial role in stalling progress. In addition, participants stressed that resistance, whether societal, institutional, or political, cannot be addressed solely at the organisational level. Wider societal dynamics, such as the rise of conservative rhetoric, play a significant role in shaping and limiting the capacity of organisations to implement GE reforms. This highlights the importance of considering the broader political and social climate, where multiple agendas—both progressive and regressive—often coexist, creating ongoing tensions that impede organisational action.

The discussion underscored three main points: first, that the success of GE initiatives is determined more by the nature of the external political and social environment than by internal organisational efforts alone. Second, organisations face a dual challenge of sustaining existing achievements while managing setbacks caused by external pressures. Lastly, formal plans, though essential, are often insufficient on their own to bring about

deep-rooted cultural change. Deep cultural factors, including entrenched societal norms and values, remain a significant barrier to progress, even when organisations have formal plans in place. Therefore, any indicators assessing supportive social and cultural contexts must account for this temporal and dynamic nature of societal change, recognising both the advances made and the ongoing resistances that shape the implementation of GE initiatives.

Discussion: endorsement of factors and related indicators

As discussed previously, the primary objective of the co-creation workshop was to provide a space for collaborative discussion and feedback on the relevance and applicability of the indicators (related to each factor) derived from INSPIRE's empirical case-study research, particularly in terms of their association with tangible shifts towards greater GE within participating organisations. And indeed overall, the workshop findings confirm the validity and the significance of the proposed factors and many of their indicators. While there was some variation in the level of consensus regarding the importance of individual indicators depending on the particular organisational and geopolitical context that the participants found themselves within, all overarching factors were endorsed as important within each group. This suggests a strong alignment between many of the indicators and the types of organisational and systemic changes practitioners associate with progress towards GE.

However, as discussed particularly in the presentation of the group discussions on Factor 3: Advanced Gender Knowledge, the plenary discussion at the outset also echoed the key challenge: participants expressed confusion about the abstract nature of some indicators, which might point to the inaccessible nature of academic language and concepts (Lather 1996) or language barriers, and they also expressed uncertainty regarding the underlying intent behind the evaluation process, pointing to an opaque methodological design. Indeed, we observed that conceptual and linguistic ambiguity affected how group members were able to participate in the discussions. It shaped the extent to which they could engage with the concept itself and influenced the dynamics of group interactions, especially when time had to be spent clarifying terms and recalibrating the conversation. Additionally, a lack of clarity was expressed around whether the participants were being asked to assess how the absence of an indicator might hypothetically hinder change within their context, or whether the absence of an indicator in their organisation indicated a lack of change. This initial uncertainty influenced how participants engaged with the framework and approached it from different interpretative angles. Some assessed the indicators based on whether they were currently present or absent in their own institutions, while others focused more on the indicators' perceived contributions to structural change. This divergence in understanding led to varying interpretations and, at times,

made it difficult to reach a unified consensus during discussions, and thus also provided a challenge in the interpretations of the discussions. From these two misunderstandings, we can deduce two important learning points—one about the importance of clarity regarding hypothetical vs perceived experiential impact when designing co-creation methodology, and one about the often implicit knowledge required to access academic concepts and language, as well as the situatedness of contexts and experiences. Indeed, in relation to the latter point, and in line with a decolonial approach, it is important to allow space for each participant to expand upon the specific geopolitical context that they find themselves in and the ways that inequalities manifest there (Bonder & Tamargo 2025; Morgade 2025).

Notably, out of all the indicators identified across all six factors, only two indicators were unanimously considered unimportant by the participants—"extensive network of NGOs and civil society organisations" under the factor of "Supportive Context" and "academic freedom undermining equality work" under the factor of "Enforceable Legislation." They were both also viewed as relatively contributing to the status quo or backlash. However, given the vital importance of academic freedom to research institutions and given the direct link between academic freedom and the current backlash against feminist knowledge production, gender, and GE and EDI work (Butler 2024; Goetz 2020; Graff and Korolczuk 2022; Kuhar and Paternotte 2017), we argue that further research that specifically explores this disputed factor is necessary. It is important to understand exactly if this disputed factor was because GE and EDI practitioners did not find this indicator important, or if all relevant stakeholders concerning GE and EDI work in universities do not find it important. Nonetheless, despite these two exceptions, the validation of the majority of the other indicators points to their importance in capturing key dimensions of organisational transformation towards sustaining GE and EDI in universities. The findings thus confirm that the indicators linked to the six factors of GEP success distilled by the case studies have overarchingly created a robust framework, though they also suggest the value of further contextual refinement for certain indicators in future applications.

GE/EDI Diagnostic Tool. Reflecting upon the findings of our co-creation workshop, in this section we present and discuss the GE/EDI diagnostic tool we have developed based on the findings from the case studies and the important input that came out of the co-creation workshop. Diagnostic tools are an important intervention in GE/EDI work, as they allow practitioners and organisations to pinpoint where their organisation currently are in their equality work and what kinds of initiatives they still need to incorporate and focus on.

As such, this diagnostic tool was inspired by other such GE tools, such as the GEAM tool developed by the ACT project (https://act-on-gender.eu). The tool we developed here uses a weighted numerical point system in order for organisations to understand and situate their current inclusive GE/EDI

status and to help identify which indicators they need to focus more pointedly on adopting, integrating, implementing, or adjusting.

Development

In order to develop the GE/EDI diagnostic tool, we systematically went through the feedback presented at the co-creation workshop. Where there was clear consensus in the importance of an indicator in the group work, we have weighted that indicator with an additional point. The indicators that were deemed not important in the discussion sessions were removed from the tool. Additionally, the indicators that were added by the groups were added to the tool, weighted accordingly to group consensus.

Diagnostic tool

Practitioners and stakeholders are asked to go through the following question list, answering Yes (2 points), Maybe (1 point), or No (0 points) to each indicator. For questions that are worth 2 points, participants must multiply their answer by two, reflecting the importance of that indicator. So, for example, if the person answers that yes, they have accountability of top leadership for GE/EDI, instead of receiving two points in all for this indicator, they will receive four. The diagnostic tool then allows one to get an overview of the overall placement of GE/EDI work in each of the specific factors, as well as an overall score on the work of GE/EDI works in their organisation by combining the scores of all six areas.

1 Strategic Organisational Commitment (out of 16 points total)
   a GE/EDI is among key values/strategic priorities of the organisation (1 point).
   b Have dedicated resources (at least 2x FTE or equivalent) (1 point).
   c GE/EDI officers participate with voice and vote in top leadership decision-making (1 point).
   d Organisation has a GE/EDI governance frame (1 point).
   e Accountability of top leadership for GE/EDI (2 points).
   f Vice president for GE or EDI (2 points).

2 Comprehensive Data for Equalities Decision-making (out of 20 points total)
   a Monitoring framework in place tied to GE goals/targets (2 points).
   b Existence of data expert group (1 point).
   c Periodic systematic data collection, including quantitative and qualitative data (2 points).
   d Data systematically feeds into decision-making (2 points).
   e Evaluation of progress made on tackling inequalities (1 point).

f Tailored/context-specific data collection processes (1 point).
g Transparent/real-time data dashboards. (1 point).

3 Advanced Gender Knowledge (out of 16 points total)

a Experiences of discrimination by minoritised groups become part of the knowledge base and feed into intervention design (2 points).
b Training for the whole organisation community is mainstreamed (optional 1 point; mandatory 2 points) (2 points).
c GE becomes a criterion in scientific and administrative decision-making (1 point).
d Rationale of GEP (social justice/business logic) and scope (beyond gender—intersectional/EDI) (1 point).
e Gender dimension integrated across all disciplines, including high-status disciplines (1 point).
f State-of-the-art knowledge feeds into GEP design and actions (structural change) (1 point).

4 Community for Change (out of 16 points total)

a Men are involved in GE/EDI work (1 point).
b Includes academic and administrative middle management (2 points).
c Sustainable: GE/EDI work is formally recognised (pay/career progression/reduction of teaching load) (1 point).
d Effective organisational processes and procedures are implemented (2 points).
e Bottom-up initiatives, for example, staff initiatives (1 point).
f Scope: all/most stakeholders groups are involved in/represented in the change process (1 point).

5 Enforceable Legislation (out of 18 total)

a Effective sanctions (1 point).
b Presence of comprehensive and progressive national legislation and policies (recourses and status) (2 points).
c Legislation specifies organisational GE/EDI thematic content and process elements (1 point).
d Solid external certification/quality standard checks in place (compliance check) (1 point).
e Policies of the organisation (2 points).
f GE/EDI policy in the institution (2 points).

6 Supportive cultural and social context (out of 18 total)

a Discriminatory behaviour is called out and tackled by the majority (2 points).
b Empathy and respect are the default (2 points).
c GE is strived for and permeates the organisation (2 points).

d Existence of social feminist movements inside and outside the organisation (2 points).
e Wider social consensus in favour of GE (1 point).

Scoring levels of organisational change

Level 1: Meeting minimum GE requirements (between 0 and 24 points).

It is important to be compliant with the EU's requirement of a GEP for Horizon Europe funding. Organisations at this level are still meeting the minimum requirements. Moving beyond this stage, however, will help promote positive, organisational change for staff and for the organisation.

Level 2: Active GE/EDI work (between 25 and 49 points).

At this level, the organisation is active in starting to implement a strategic approach to GE/EDI work. However, more structural strategic commitments are lacking.

Level 3: Strategic GE/EDI work (between 50 and 74 points).

A successful organisation-wide strategy has been developed and implemented. There are a few points that could be better strengthened and addressed.

Level 4: Leader in GE/EDI practice (between 75 and 104 points).

The organisation has comprehensively addressed GE/EDI by creating, implementing, monitoring and evaluating strategic initiatives across the organisation and at different organisational levels. But, of course, GE/EDI is never solved, and there's always more work that can be done—next steps might include reaching out to the organisation and to stakeholders to hear how initiatives can be made better and more inclusive and more intersectional.

Conclusions

This chapter has presented and reflected upon the co-creation workshop design and discussions about the six GEP success factors identified in the case-study work (Strategic Organisational Commitment, Comprehensive Data Collection for Equalities Decision-Making, Advanced Gender Knowledge, Inclusive Communities of Change, Enforceable Legislation, and Supportive Context), and how expert practitioners in the field perceived and understood the importance and the success of indicators related to these six factors, as well as missing indicators. Furthermore, we have also pointed to areas where more research into the specific indicators is necessary, for example, on academic freedom as it relates to GE/EDI progress in higher education.

On the basis of this co-creative process and input from practitioners, we have developed the GE/EDI diagnostic tool, which is a helpful tool to help organisations diagnose the level to which GE initiatives and EDI are embedded to create successful organisational change within their particular

organisational context. Additionally, the tool can specifically pinpoint both individual elements that the organisation needs to focus on, as well as an overall insight into the status of the organisation's work.

Note

1 In this chapter, we refer to the final names of all six GEP impact factors: (1) Strategic Organisational Commitment, (2) Comprehensive Data for Equalities Decision-Making, (3) Advanced Gender Knowledge, (4) Inclusive Communities of Change, (5) Enforceable Legislation, and (6) Supportive Context. At the time of the workshop, these final titles still had to be fixed. At the time of the workshop, these six factors were entitled: (1) Strategic Commitment, (2) Evidence-Based, Reflexive Approach, (3) Knowledge/Competence, (4) Inclusive Community of Change Agents, (5) Enforceable Legislation, and (6) Supportive Social and Cultural Context. In the interests of remaining true to the other chapters of this book, we decided to foreground the latest titles of the six factors.

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