

EQUATION - EQUality through AccreditaTION

WP3 Guidelines on Gender
Equality Implementation Plan



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The Guidelines on Gender Equality
Implementation Plan

1. Introduction

A systemic approach that promotes institutional changes through Gender Equality Plans has the potential to engender a new commitment from the Commission, EU governments, research funding organisations and research performing organisations to the gender mainstreaming efforts.

Institutional (or structural) change is the dominant approach to advancing gender equality in research and innovation, promoted by the European Commission and an increasing number of EU countries. Nevertheless, despite massive regulations to promote gender equality, meaningful implementation has not occurred (Kidron and Chalutz Ben-Gal, 2022; Meier, 2005). Gender mainstreaming, an attempt at innovation in gender equality policies and an attempt to overcome the limitations of previous gender equality strategies, in fact, does not break down the genderedness of organisations substantially (Benschop & Verloo 2006).

Over the years, there has been a growth in understanding of the change processes, with a recognition of the ongoing and never-finished nature of the gender mainstreaming effort, and the necessity for actors to be equipped for the change process in terms of both gender expertise and institutional change capacity. The focus of institutionalist approaches to institutional change has traditionally been on exogenous influences, with a greater emphasis on continuity and stability (Mergaert, Cacace & Linková 2022). However, there is a growing recognition that new institutionalist theories must also consider historical and contextual effects, as well as the inner workings of institutions characterised by power and resistance.

The question thus arises as to why. Given the varying ways in which institutions operate in response to different socio-political contexts, historical backgrounds, and feminist histories, as well as their varying capacities for change, it is evident that a more nuanced approach to understanding institutional dynamics is necessary. It thus follows that there is a demand for the adaptation of GEPs to local contexts. And while there have been calls for the 'tailoring' of plans (GEAR tool 2022, 23), there has been little to no guidance on how exactly this should be done.

While policy development is undoubtedly a crucial step, it is not a standalone solution to achieving (inclusive) gender equality. In the absence of structures and strategies designed to facilitate and clarify the implementation of these policies, it might come to the prevalence of rhetorical compliance with gender equality or 'window-dressing', instead of bringing about actual change.

In addition, the political climate changes, and with it the systemic support (or lack of it) for gender equality efforts. The passive and active resistance, backlash and negative spill-over from non-targeted groups (Leslie et al. 2024) are all too familiar to gender equality practitioners and should be anticipated as part of the process. As such, the process of social change should not be understood as a linear, progressive development, but as a dynamic of progress and backlash, with intended and unintended effects (ibid).

The Guidelines on Gender Equality Implementation Plan thus have twofold objectives:

- 1) to promote structural change as a tailor-made instrument for making strides towards gender equality,
- 2) to consider the context to develop effective, context-specific gender equality actions.

The Guidelines include a practical template to enhance the tailor-made process of implementing Gender Equality Implementation Plans. The template and the Guidelines are designed to be applicable to organisations that already have Gender Equality Plans or other diversity policies in place. Some parts of the template or implementation guidelines may, therefore, be redundant.

The template is designed as a hands-on action plan following the overarching institutional gender equality strategy with specified activities/measures, indicators, target groups, accountable persons, and a timeline for a particular action. The Guidelines offer a systematic approach to the assessment of an existing strategy, with the objective of extending its impact and identifying potential structural modifications.

2. Conceptual Framework for Gender Equality Implementation Plan

2.1 European legislation framework

Gender Equality Implementation Plan follows the overarching strategy, usually a Gender Equality Plan, and operationalizes it by specifying activities, measures, indicators, target groups, accountable persons and timelines for each action. It serves as a critical tool for re-adjusting the ongoing strategy by providing a clear roadmap and ensuring that gender equality initiatives are not left unaddressed or stalled due to vague timelines or lack of accountability. As such, it is secondary to the overarching strategy, codified in the Gender Equality Plan, but refers to it and refreshes its course.

For Horizon Europe calls with deadlines in 2022 and onwards, having a Gender Equality Plan (GEP) is an eligibility criterion for all public bodies, higher education institutions and research organisations from EU Member States and associated countries wishing to participate (European Commission, 2024).

Chapter 4 of the Horizon Europe Guidance on Gender Equality Plans¹ provides detailed guidance on the mandatory process-related building blocks for implementing Gender Equality Plans (GEPs):

¹ European Commission, Directorate-General for Research and Innovation, (2021). *Horizon Europe guidance on gender equality plans*, Publications Office of the European Union. <https://data.europa.eu/doi/10.2777/876509>.

- **Publication and Official Endorsement of the GEP:** Emphasizes the need for GEPs to be formally documented, endorsed by top management, published on the organization's website, and communicated within the institution.
- **Dedicated Resources:** Stresses the importance of allocating dedicated resources and expertise to implement the GEP effectively, tailored to the organization's size and needs.
- **Data Collection and Monitoring:** Covers the necessity of collecting sex/gender-disaggregated data and establishing a monitoring framework to track progress and inform the GEP's ongoing development.
- **Training:** Highlights the requirement for awareness-raising and training activities within the organization to address gender biases and support the GEP's goals.

Chapter 5 of the Horizon Europe Guidance on Gender Equality Plans provides detailed guidance on the recommended content-related building blocks for implementing GEPs, which we propose to follow in the design of our own GEPs. These are:

- 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.

Each of the mentioned areas necessitates a strategic and systematic approach, including the establishment of Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals. As per our internal research findings,² the overarching strategies lacked concrete goals, a comprehensive matrix of measures, designated accountable personnel or offices, and a defined timeline. We assess that what contributed to the slow pace of change was due to lack of context-specificity, inactivity, a lack of accountability, and the absence of time-bound measures.

To avoid policy stagnation, we suggest to evaluate the existing plan, using the Guidelines & template below, and check whether the plan has all mandatory process-related factors, all context-specific and institution-specific priority areas that were identified as having gender gaps in gender audit.

We should take into consideration that a realistic bar for evaluating effectiveness is not whether the initiatives eradicate inequality, but whether they make strides toward reducing it (Leslie et al. 2024, 6)

While evaluating, we should also have in mind that the new ERA agenda (EC, 2020, p. 16) proposes that member states from 2021 will be required to develop 'inclusive gender equality plans' that take into account that gender intersects with other diversity categories and potential grounds for discrimination, such as ethnicity, nationality (locality), disability, sexual orientation, social class etc.

In evaluating the policy development process, we should involve stakeholder at all levels, making sure that the plan is tailored to the specific context and needs of the organization. We

² As part of the EQUATION project in work package 3, the IEDC team carried out a comparative analysis of the existing GEP and other diversity strategies in the partner institutions.

should also check whether the plan includes the commitment for the regular monitoring and evaluation, which are two essential components to assess the progress and effectiveness of the GEP, allowing for adjustments and improvements over time.

Creating a Gender Equality Implementation Plan is crucial for fostering an inclusive and equitable environment within universities, as they enhance the implementation of a strategy. Annex 1 below contains a template for a Gender Equality Implementation Plan, which includes suggested core components and examples from Institution X on how to utilise it.

2.2 Gender equality strategies: The benefits of top-down, bottom-up and cross-cutting approaches

Kalpazidou Schmidt and Cacace (2019) examine a framework to activate gender equality structural transformation in research organizations. The authors argue for the integration of gender perspectives across research practices, policies, and teaching in order to promote gender equality. They also mention the necessity of leadership commitment, comprehensive data collection, and that the strategies address the specific institutional context.

They also emphasise the necessity for continuous evaluation and adaptation of GEPs in order to guarantee their efficacy and sustainability.

Table 1: Gender equality strategies: The benefits of top-down, bottom-up and cross-cutting approaches

Approach	Measure
Top-down approach—targeting internal stakeholders	<ul style="list-style-type: none"> - Mobilizing and committing the leadership - Mobilizing and committing internal stakeholders - Supporting and advising GE and Diversity Committees - Supporting and advising the HR department - Cooperating with the communication department - Making visible vertical and horizontal segregation - Training research leaders
Top-down approach—targeting external stakeholders	<ul style="list-style-type: none"> - Mobilizing public opinion at national level (media, conferences, workshops, etc.) - Mobilizing external stakeholders, national agencies (communication

	<p>and dissemination activities)</p> <ul style="list-style-type: none"> - Mobilizing the political system (policymakers at different levels)
Bottom-up approach—targeting internal stakeholders	<ul style="list-style-type: none"> - Outreaching, mobilizing and supporting female researchers - Establishing, supporting and advising informal female networks - Organizing empowerment initiatives for young female researchers
Bottom-up approach—targeting external stakeholders	<ul style="list-style-type: none"> - Promoting empirical research—evidence-based reports and theses on GE - Establishing a GE resource centre open to all
Cross-cutting approach	<ul style="list-style-type: none"> - Integrating top-down and bottom-up approaches - Achieving legitimacy and visibility (locally, nationally) - Re-designing action plans to include new aspects of GE policy - Small steps approach linking GE to recognized issues - Linking GE to innovation, internationalization, competitiveness issues - Pan-national/pan-university awareness raising - Producing evidence-based policy input - Communicating and disseminating information (locally, nationally) - Challenging the idea of the ‘gender-blind’ science, pointing out the limits of meritocracy - Challenging the concept of excellence

Source: Kalpazidou Schmidt and Cacace 2019, 13

The authors distinguish between top-down, bottom-up and cross-cutting methods and measures. They also differentiate between measures aimed at internal and external stakeholders.

A top-down approach directed at internal stakeholders involves the mobilization and engagement of leadership and internal constituents, the provision of support and advisory services to gender equality committees and human resources departments, collaboration with communication departments, the illumination of vertical and horizontal segregation, and the training of research leaders.

This top-down approach also extends to external stakeholders by galvanizing public opinion at the national level through media, conferences, and workshops, engaging external stakeholders and national agencies via communication and dissemination activities, and mobilizing the political apparatus at various echelons.

Concurrently, a bottom-up approach concentrates on internal stakeholders by reaching out to, mobilizing, and supporting female researchers, establishing and bolstering informal women's networks, and organizing empowerment initiatives for nascent female researchers.

Bottom-up approach also addresses external stakeholders by advocating for empirical research through evidence-based reports and theses on gender equality and establishing a gender equality resource centre accessible to all.

Integrating both top-down and bottom-up methodologies, a cross-cutting approach attains legitimacy and visibility at local and national levels, redesigns action plans to incorporate novel aspects of gender equality policies, and adopts incremental measures to intertwine gender equality with recognized issues. Furthermore, it correlates gender equality with innovation, internationalization, and competitiveness, augments awareness at the transnational/university level, formulates evidence-based policies, and orchestrates the communication and dissemination of information locally and nationally. Additionally, it interrogates the notion of "gender-invisible" science, elucidating the constraints of meritocracy, and scrutinizes the concept of excellence.

The strategy that combines top-down, bottom-up and cross-cutting approaches ensures a holistic and sustainable advancement towards gender equality in scientific environments.

The effect was the generation of a dynamic process feeding the three approaches into each other in an integrative strategy and thus reinforcing their impact to produce sustainable structural change.

2.3 Negotiating change and change agents

Negotiating change within institutions to implement Gender Equality Plans (GEPs) is a complex and inherently political process. Various authors highlight the necessity of leveraging negotiation techniques to overcome barriers, considering the historical, national, and institutional specificities that shape each organization's context (Linkova & Mergaert, 2021).

Linkova & Mergaert (2021) introduce the "trading zone" concept into institutional change debates, which is a novel framework for understanding the negotiation processes and interactions between actors with differentiated power positions within organizations. This perspective emphasizes **the importance of small wins** to maintain momentum in the change process, acknowledging that significant transformations often occur incrementally.

To explicate further, the success of GEP implementation heavily depends on the positioning of the implementing teams within the organization. Typically, GEP responsibilities are not centrally located at the highest institutional levels, but on the margins, in gender centres, or units of gender knowledge, or are given as a task to young researchers without any institutional power. This hinders the effectiveness of these policies. The positioning of the teams influences their ability to access decision-makers and build alliances across the institution, which are crucial for sustaining support.

Change agents, however, play a critical role in negotiating and driving institutional change. They must possess a range of skills and competencies, including gender expertise, negotiation skills, strategic framing, and the ability to mobilize stakeholders. These agents need to understand the institutional landscape and strategically position themselves to take advantage of windows of opportunity, subverting and redefining institutional values to align with gender equality goals.

Effective change agents must be adept at forming strategic alliances within and outside the institution. This involves engaging with feminist academics, central services, and people in key positions to build a supportive network. They also need to harness opportunities for strategic framing, presenting gender equality as essential to the institution's core values. For example, addressing the gender dimension in research and innovation can be framed as crucial for maintaining the excellence and robustness of research practices.

To navigate the complex terrain of institutional change, change agents must develop several key competencies:

- **negotiation skills**, essential for overcoming resistance and securing buy-in from various stakeholders;
- **strategic framing**, crucial for aligning gender equality goals with the institution's broader mission and values;
- **stakeholder mobilization**, which involves rallying support from both internal and external actors to create a broad base of advocacy;
- **participatory and co-creation techniques**, engaging all relevant actors in the planning and implementation process to ensure buy-in and shared ownership of gender equality initiatives.

We consider the existence of change agents as one of the impact drivers for change, which we include in the Gender Equality Implementation Plan (Annex 1).

2.4 Impact Drivers model

In the context of the CASPER project, Mergaert, Cacace & Linková (2022) further developed the policy evaluation approach based on factors that drive successful gender equality initiatives in research and higher education institutions. They created and tested the Impact Drivers model that provides a comprehensive benchmarking matrix for understanding which impact drivers are easier or more challenging to achieve.

This model includes twelve key impact drivers and outlines six stages of institutional capacity development, ranging from the "Starting Point" to "Institutionalisation."

Table 2: Excerpt from an impact driver model with indicators and rubrics

IMPACT DRIVER	Indicator	Starting Point	Project	Inception	Growth	Integration	Institutionalisation
CORE TEAM OF CHANGE AGENTS	A core team of change agents exists, the size and composition of which are commensurate with the size and complexity of the organisation	There is no core team.	An individual or small group has started working on GE, not yet in a very coordinated way.	The core team, as a driver of the institutional change work, takes shape, and there is some internal coordination	There is a coordinated core team, and its composition starts to reflect the features and needs of the organisation	There is a coordinated core team that is not yet fully adequate in view of the organisational structure and size	The core team's size and composition are commensurate with the size and complexity of the organisation
	The core team of change agents comprises motivated people; the core team of change agents has a formal mandate and ownership over the endeavour	Either nobody has a mandate for GE, even if there are a few individuals interested in GE, or there is no real motivation to take up the issue	With or without a mandate, there is a person that started working on GE, motivated to be a change agent within the organisation	A small group of motivated people is working on GE	A core group of motivated people is steering the GE work and is internally recognised as 'in charge'	A core group of motivated people has a formal mandate to work on GE, but does not have full ownership over the process	A gender equality unit, with a formal mandate and control over the process, oversees the institutional GE work and has direct links to the leadership
	The core team of change agents has access to an extended group of change agents	There is no core team	There is minimal engagement with other people in the organisation	The change agent network consists of the core team and a	The change agent network grows beyond the core team, to include other allies,	Beyond the core team and its circle of supporters, there are formally	The formally appointed change agent team works with officially appointed representatives of

			regarding GE work	limited number of supportive individuals	ambassadors and supporters who are willing to contribute with skills, expertise, and public support	appointed representatives of immediately related units	research and administrative units and leadership
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Source: Mergaert, Cacace & Linková 2022, 11

The stages provide a roadmap for institutions to embed gender equality into their core operations and culture. Besides the core team of change agents, the impact drivers encompass other crucial elements, such as leadership commitment, resource availability, and systematic data collection.

We incorporated this model as a fundamental component of Gender Equality Implementation Plans (GEIPs), which are designed to assess and enhance the sustainability and impact of institutional changes towards gender equality. The adapted model for the EQUATION project can be found under 'Part B' of the template for GEIPs in Annex 1.

2.5 Designing a context-based tailored plan

As highlighted above, Gender Equality implementation Plan (GEPs) effectively requires a deep understanding of the context in which an institution operates, considering historical, national, and institutional specificities.

National policies and legislative frameworks significantly influence the scope and pace of GEP implementation. For example, centralized national recruitment policies can hinder local gender equality initiatives by imposing uniform regulations that may not align with the specific needs of individual institutions. Consequently, GEPs must be tailored to fit the unique organizational contexts of each university. Institutions with well-established equality infrastructures and supportive cultures are generally more successful in implementing structural changes compared to those adopting a purely compliance-based approach.

To address these challenges, in GEIPs, we need to evaluate the existing implementation and factor in the various specific institutional points of stagnation or resistance and backlashes. In such cases, context plays a crucial role in the interpretation, enactment, and impact of gender equality policies.

3. GEP implementation challenges

In this chapter, we want to demonstrate typical challenges in the change process and how to overcome them.

Typical challenges in institutional change efforts are connected to gender equality initiatives competing with other organisational agendas, facing resistances, dealing with power

imbalances and hierarchies, a lack or loss of leadership support and non-linearity of progress. These challenges can significantly impede the progress of gender equality initiatives.

3.1 Gender equality initiatives competing with other organisational agendas

The implementation of gender equality measures in academia often clashes with the existing culture of meritocracy, which underpins the logic of operations in academic institutions. Despite being viewed as an impartial organizing principle, evidence suggests that meritocracy is inherently gendered (van den Brink and Benschop, 2011; Linková, 2017).

Ideas of individual excellence and meritocracy are closely tied to performative conceptualization of choice and neoliberal discourses of individualized responsibility in research and higher education, and are used to obscure existing structural gender inequalities. This perspective often shifts the responsibility for women's underrepresentation and disadvantaged positions in leadership onto the women themselves, rather than addressing the institutional barriers they face. As such, the institutions are absolved from accountability in ensuring equality (Linkova, Özkanlı & Zulu 2021).

While gender equality policies in research and higher education have been implemented at both national and institutional levels in various countries, the prevalence of neoliberal culture of individual 'choice' of taking (or not taking) the necessary steps to succeed in academia without considering the structural barriers, means that these gender equality policies often remain superficial. Instead of addressing systemic issues, efforts tend to focus on "fixing women" or "equipping women" to overcome perceived deficiencies. This approach not only limits the effectiveness of gender equality initiatives but also perpetuates the belief that women's lack of achievement is due to their own shortcomings rather than structural obstacles (Linkova, Özkanlı & Zulu 2021).

The persistence of these individualizing discourses constrains ongoing attempts to promote gender equality and shapes the nature of the actions taken. Although gender mainstreaming can lead to changes, especially for improving work-place outcomes for the groups it targets when implemented in certain ways (Leslie et al. 2024, 1), it often fails to dismantle the deeply ingrained gender biases within organizations.

Institutions, including those in research and higher education, rarely adhere to a single organizational logic (Law, 1994; Linková, 2014). In response to external pressures, new organizational logics may be introduced, necessitating the ability of institutions to layer these logics effectively. The process of layering involves adding new gender equality actions onto pre-existing organizational structures, a task that is fraught with complexities due to competing priorities and ingrained practices (Mergaert, Cacace & Linková 2022).

Gender mainstreaming recommendations should take into account the power imbalances between the competing priorities. An image of equal cooperation between parties pursuing a dual agenda of business needs and feminist goals (Benschop & Verloo 2006) seems like an ideal image, while in reality, significant power disparities between these parties influence the outcomes and undermine the transformative and innovative potential of gender mainstreaming (Ibid.).

3.2 Resistances to gender equality initiatives

Implementing gender equality initiatives often encounters various forms of resistance within academic institutions. Jordão et al. (2020) and O'Connor and White (2021) identify several key resistances, including institutional inertia, a lack of resources, and the perception that gender equality poses a threat to the established meritocratic systems.

Tildesley et al. (2022) provide a detailed examination of the dynamics of resistance and counter-resistance in the context of gender equality policies within universities. Their study reveals that opposition to gender reforms is deeply embedded in existing power relations, with resistance often aimed at preserving the status quo. In the table below, various forms of resistance are highlighted, such as the refusal to accept responsibility and trivialization of gender equality efforts, and denial of the need for change.

The authors list examples of how these two types of resistances manifest in institutional environments, and they exemplify the informal rules and underlying factors that enable them. As expressed by the authors, ‘/b/e they institutional and/or individual, implicit or explicit, the resistances encountered are expressions of power over that seek to maintain the status quo and unequal power relations in higher education institutions’ (Tildesley et al. 2022, 890)

Table 3: Forms of resistance, underlying informal rules, and enabling factors

Form of Resistance	Examples	Informal Rules	Enabling Factors
Refusal to accept responsibility and trivialization	Underinstitutionalization of gender equality units (understaffed and underfunded)	Gender equality as a nonpriority, second-class issue	Lack of external and internal supervision and enforcement mechanisms
	Undervaluing of gender equality work		Neoliberal tendencies;
	No commitment to assume gender equality work		Change claims alien to the hegemonic ideas of the institutional context
	Poor implementation of work-life balance policies	Departmental autonomy; seniority rules; male privilege	
	Non-mainstreaming of gender in teaching and research	Academic freedom; androcentric knowledge	
	Rejection of positive action	Disembodiment, cult of individual responsibility; meritocracy	
	Neglect of care issues	Care as women’s	

		individual problem; gender stereotypes	
	Lack of action on gender segregation in study fields	Gender stereotypes	
Denial of the need for change	Disbelief about existing inequalities	Fallacy of equality	Organizational gendered subculture and hierarchies
	Old boys' networks	Male entitlement	
	Exclusion of women and promotion of men	Overvaluation of men's work; undervaluation of women's work; authoritarian male workstyle; gender stereotypes and biases	Conservative/anti-gender movement
	Oversurveillance of women managers		
	Fear of feminization		
	Gender equality as "ideological indoctrination"	Fallacy of equality; prejudices against feminist policy	
	Nonparticipation in gender equality actions	Departmental autonomy; academic freedom	

Source: Tildesley et al. 2022, 891

As displayed in the table above, one significant manifestation of the resistance is **the refusal to accept responsibility and trivialization of gender efforts**, evident in the underfunding and understaffing of gender equality units. This resistance stems from the perception of gender equality as a secondary or low-priority issue, further exacerbated by the absence of internal supervision and enforcement mechanisms.

Another example is the undervaluation of gender equality work, which is shaped by neoliberal tendencies towards obscuring the structural barriers and reinforcing the ideology of individual choice, while the of lack of institutional commitment is enabled by the institutional framing of gender equality initiatives as incongruent with dominant institutional ideologies.

The poor implementation of work-life balance policies is an informal rule that departments have autonomy in this area, and as such reproducing seniority-based practices, and entrenched male privilege.

Simultaneously, the exclusion of gender perspectives from teaching and research is justified under the guise of academic freedom and through the androcentric nature of knowledge production.

Resistance to affirmative measures, such as positive action, is rooted in the cult of individual responsibility and the ideology of meritocracy, which fail to acknowledge structural inequalities. Similarly, care-related challenges are dismissed as private responsibilities of women, reinforcing traditional gender stereotypes.

A particularly pervasive form of resistance is the **denial of the need for change**, that manifests as a disbelief about existing inequalities, which is upheld by the informal rule of seeing equality as fallacy, or it manifests as ‘old boys network’, which is connected to the informal rule of male entitlement. Both of these examples are sustained by organizational gendered subcultures and hierarchies.

The exclusion of women and preferential treatment of men arises from the informal rules, where men’s work is overvalued and women’s work is undervalued, which is enabled by the conservative and anti-gender ideologies.

Similarly, women in leadership roles frequently face excessive surveillance, driven by a fear of feminization, and gender equality policies are often dismissed as forms of ideological indoctrination, which is driven by prejudice against feminist policy.

Finally, resistance in the form of denial of the need for change is also expressed through nonparticipation in gender equality initiatives, which is frequently justified by appeals to departmental autonomy and academic freedom.

Across these forms of resistance, common themes emerge, including entrenched gender stereotypes, denial of structural inequalities, and an overarching desire to preserve the status quo. Addressing these challenges requires robust mechanisms for implementation and monitoring, alongside a concerted effort to raise awareness and foster engagement across academic communities.

3.3 Forms of Counter-Resistance

The change process is of an inherently processual nature and entails a process of layering (Linkova & Mergaert, 2021, p. 305), where new gender equality actions are added to previously existing organisational logics. As illustrated above, the implementation of GEP can also encounter resistances in various forms and substances. Consequently, strategies have been developed to leverage competing agendas and create a sound basis for the implementation to proceed.

Counter-resistance can manifest in several ways, from reasserting positional power of equality efforts to strategic framing and forming alliances. Tildesley et al. in table 2 below outline specific examples of counter-resistance, the informal rules they contest, and the factors that enable counter-resistances.

Table 4: Forms of counter-resistance, contested informal rules, and enabling factors

Form of Counter resistance	Example	Contested Informal Rules	Enabling Factors
Power to	Reasserting the equality unit's positional power	Gender equality as nonpriority, second-class issue; Prejudices against feminist policy	Equality legislation
	Strategic framing	Gender equality as nonpriority, second-class issue	Relevance of quality assurance, sustainability, or excellence for universities
	Engagement with global feminist campaigns	Fallacy of equality	Strength of the women's movement
	Engagement with other public or private institutions		Relevance of knowledge transfer and public exposure for universities' social impact
	Inclusion in high-ranked decision-making bodies	Gender equality as nonpriority, second-class issue; Departmental autonomy; academic freedom	Political will of the university's rector; equality actors' social capital and negotiation skills
	Playing the resignation card	Equality unit directors as not essential in university management	Equality actors' social capital
	Signing agreements with other public institutions	Gender equality as nonpriority, second-class issue	Shared gender equality objectives; embeddedness of equality actors in external networks
Power with	Rescaling, decentralizing the equality structure	Gender equality as nonpriority, second-class issue	Shared progressive, feminist values; equality actors' social capital; high-level support; departmentalized organizational structure

	Alliances with feminist academics; Alliances with central services or individuals in key positions	Androcentric knowledge; Hostile university culture; misogyny, authoritarian work styles, male entitlement and privilege)	Shared progressivism and feminist values; informal feminist work; women's homosociality; equality actors' social capital
	Alliances with students		Shared feminist values; strength of the women's movement
	Alliances within interuniversity forums		Shared feminist strategies and good practices; support of mainstream actors
	Alliances with external actors	Gender equality as nonpriority, second-class issue; Androcentric knowledge	Shared feminist values, embeddedness of equality actors in external networks

Source: Tildesley et al. 2022, 898

Tildesley et al. distinguish between the *power to*, and *power with* counter-resistances, the first suggesting who should be given power to achieve social change, and the second suggesting with whom we should build power.

As a *power to* counter-resistance, they suggest strategic reassertion of positional power by equality units and the inclusion of GE actors in decision-making bodies and signing agreements with other institutions, challenging the informal rule of gender equality being a nonpriority or second-class issue. Equality legislation, political will of University's rector and social capital of GE actors and are crucial in these efforts.

Engagement with global feminist campaigns might help contest the informal rule where equality is seen as fallacy.

Another counter-resistance is the strategic framing of equality efforts, enabled by the external standards, such as relevance of quality assurance, sustainability, or excellence for universities.

Tildesley et al. further explore the concept of "power with," emphasizing the importance of alliances with feminist academics, students, and external actors. These alliances are often facilitated by shared feminist values and the social capital of equality actors.

They also underscore the significance of decentralizing equality structures and engaging with global feminist campaigns to counter androcentric knowledge and hostile university cultures. Overall, table 2 provides a comprehensive an overview of the counter-resistance strategies

employed to advance gender equality in higher education, taking into account the interplay between institutional power dynamics and feminist activism.

4. Gender Equality Implementation Plan

The development of gender equality implementation plan (GEIP) combines the conceptual and theoretical knowledge with practitioners' experiences gathered under WP3 from EQUATION project.

The GEIP therefore serves as a tool in reinforcing and revitalizing an institution's existing Gender Equality Plan (GEP). The main aim and novelty of the GEIP is to revitalise the stale gender policies, overcome the gender fatigue, and advance the goals in a manner that is both effective and sustainable.

While the GEP outlines the institution's strategic commitment to gender equality and sets overarching goals, the GEIP provides a structured approach for translating these commitments into concrete actions. It operationalizes the GEP by defining specific measures, indicators, timelines, and accountability structures, ensuring that gender equality initiatives move beyond policy statements to effective implementation.

By integrating the GEIP within institutional frameworks, organizations can systematically assess the strengths and gaps of their current GEP. The GEIP functions as a dynamic and adaptive mechanism that helps institutions refine their strategies based on real-time assessments and stakeholder feedback. Through continuous monitoring and evaluation, it ensures that GEPs remain responsive to changing institutional contexts, external legislative developments, and emerging challenges in gender equality.

The GEIP is not a replacement for an existing GEP but rather a complementary and supportive tool that enhances the impact of institutional gender equality efforts. It allows institutions to move from abstract commitments to tangible implementation by setting clear operational steps, defining realistic and measurable outcomes, and fostering accountability at all levels. The development of the GEIP enables organizations to reinvigorate their gender equality strategy by identifying areas where policies may have stalled, ensuring that progress is continuously assessed and that adjustments are made as necessary. By embedding the GEIP within existing institutional frameworks, gender equality initiatives become more integrated into daily operations, strengthening their sustainability and long-term effectiveness.

4.1. Conceptual Foundations

Conceptually, there are four references that served us when preparing the model of Gender Equality Implementation Plan. These are:

- **Horizon Europe Gender Equality framework** that we used as a reference to content aspects and core elements, as prescribed by the Horizon Europe guide (having in mind the eligibility criterion coming in place for all calls from 2021 onwards)

- **Strategies for gender equality:** This includes top-down, bottom-up, and cross-cutting approaches, emphasizing the importance of strategic institutional commitment, grassroots engagement, and integrated gender-sensitive policies.

- **Negotiating Change and Change Agents:** This perspective highlights the political and institutional negotiations required for effective GEP implementation and the role of change agents in overcoming resistance.

- **Impact Drivers Model:** This model provides a structured approach to institutional change, identifying key factors that enable or hinder progress in gender equality initiatives.

4.2 Methodology

EQUATION consortium partners served as “laboratories” of structural change; they allowed us to carry out guided observations and develop learning processes related to the implementation of gender equality plans and similar strategies.

The project allowed us to learn lessons on how to foster a process of structural change within higher education and research institutions from Eastern. We are now synthesizing these lessons in a set of guidelines on the implementation of gender equality plans within research organizations and developed a Gender Equality Implementation Plan model for the diffusion of such activities in the HIED & research sector.

We have comparatively analysed four Gender Equality Plans or similar diversity strategies from business schools, partners in EQUATION project. We identified which aspects of gender equality are particularly important for the Eastern European region, having in mind that policies and guidelines stem from western academia and western institutions that operate in a different landscape. Therefore, we argue, policies need to take into consideration different contexts, in which higher education and research institutions operate.

The guidelines contain recommendations for initiatives to promote structural change within HIED & research organizations. The model, on the other hand, is focused on the general characteristics for a HIED & research institution.

The following activities took place:

- information-gathering (through literature review, biweekly consortium meetings, GEP monitoring that was conducted by each institution, and exchanges with partners at Learning, Teaching & Training event that was organised in May 2024 at IEDC-Bled School of Management);
- analysis of existing Gender Equality Initiatives, strategies, and models;
- comparative analysis of the EQUATION's institutions' GEPs;
- drafting of the guidelines provisional version;
- peer-reviewing of the guidelines;
- development of a GEIP model for implementing gender equality policies in the HIED&research sector;
- LTT program on Gender Equality Implementation Plan with the involvement of EQUATION international partners;

- development of GEIPs by our partner institutions from Latvia, Poland and Slovenia.

4.3 Comparative Assessment of EQUATION Institutions' Gender Equality Plans (GEPs)

In this section, we present a concise review of the outcomes of the comparative analysis of EQUATION Institution's Gender Equality Plans. The plans functioned as an empirical foundation to assess which policy aspects were emphasised, which were absent, or which were overlooked. This empirical basis was instrumental in the development of the GEIP model, whose primary aim is to evaluate and enlighten the existing Gender Equality Plans.

The assessment was based on the **Horizon Europe Gender Equality framework** mentioned above, and evaluates how each GEP aligns with the process-related and content-related factors.

Process-Related Factors

The effectiveness of a GEP is determined by its public endorsement, dedicated resources, data collection & monitoring mechanisms, and training & capacity-building strategies.

Table 5: Process-Related Factors at four EQUATION institutions

Institution	Public Endorsement	Dedicated Resources	Data Collection & Monitoring	Training & Capacity Building
IEDC	Publicly available, posted on institutional website, signed by leadership	Allocates resources for GED working group	Monitoring anticipated, no indicators or evaluation procedure mentioned	Training on gender bias for staff
Vistula University	Lacks clear endorsement from leadership	The position of Equal Treatment and Anti-Discrimination Officer is created, as well as Gender Equality Committee to oversee the GEP implementation, budget for accessibility-related infrastructure projects	Evaluation mentioned but no timeline prescribed	Workshops & trainings on (1) professional ethics and (2) psychosocially supportive environment anticipated
WSB University	Published on website, but lacks	Recommendations to appoint a	Monitoring & evaluation	Organizing training on

	clear endorsement from leadership	GEO/plenipotentiary	anticipated, not specified.	equality issues, implicit stereotyping, potential barriers for all members of the academic community.
RTU	Published on website, adopted by RTU Senate	RTU Personnel Unit is the unit responsible for monitoring and updating the Plan, involving also the Office of Vice-Rector for Academic Affairs, Office of Vice-Rector for Research, and faculties.	Annual reporting submitted to the Rector for approval. Report published on the homepage of RTU.	Educational events and training programs for employees and managers.

- *Publication and Leadership Commitment*

IEDC published its GEP on the institutional website, with a formal endorsement from leadership. Vistula University and WSB University both lack clear leadership approval despite publishing their plans online. RTU, in contrast, has gone a step further making its GEP public and also formally adopting it through its Senate. This official adoption process provides RTU with a stronger institutional foundation for implementation compared to the other universities.

- *Dedicated Resources for Implementation*

No institution has clear financial resources dedicated to gender equality, but they all mandate human resources. IEDC established a GED (Gender Equality & Diversity) working group, charged with overseeing the execution of the GEP. Vistula University has established two institutions, an Equal Treatment and Anti-Discrimination Officer, and a Gender Equality Committee. It has also secured funds for accessibility-related infrastructure projects. WSB University, however, lags behind in this area, recommending to appoint a Gender Equality Officer without concrete timeline and follow-up. RTU stands out for its structured approach, placing its Personnel Unit in charge of continuously monitoring and updating the plan.

- *Monitoring & Reporting*

IEDC anticipates monitoring as part of its GEP, but it does not specify indicators or evaluation procedures. Vistula at WSB mention the evaluation, but there is no timeline or persons in charge of it specified. RTU anticipate annual reporting submitted to the University Rector, as well as publishing the evaluation reports on the RTU homepage.

- *Training Mechanisms*

IEDC focuses on staff education, mostly to awareness-raising and addressing gender bias, which may not be sufficient enough long-term. Similarly, WSB aims to organise trainings on equality issues, stereotypes and gender barriers. Vistula aims to organise workshop and trainings on professional ethics and psychosocially supportive environment. RTU aims to organise educational events for employees and managers. None of the institutions specify the number of trainings or the specific outcome.

Content-related factors

The Horizon Europe framework identifies five core areas for gender equality action: work-life balance, leadership representation, recruitment and career progression, gender in research and teaching, and anti-gender-based violence measures. Each institution's approach to these areas is evaluated below.

- *Work-Life Balance & Organizational Culture*

Table 6: Work-Life Balance & Organizational Culture at four EQUATION institutions

Institution	Work-Life Policies	Flexible Work Arrangements	Support Systems
IEDC	Work-life balance policies exist	Encourages remote work & flexibility	Limited formalized support systems
Vistula University	No clear policies on work-life balance, apart from process improvement and technology solutions for administrative tasks	No references to flexible work	No mention of childcare or caregiver support
WSB University	Strong emphasis on work-life balance	Hybrid work policy included	Support systems for parents & caregivers
RTU	Increase of employee satisfaction by ensuring work and private life balance	Introduction of a flexible and remote work mode.	Introduction of support measures for employees – care persons. Arrangement of short-time babysitting opportunities at the university.

Within the field of work-life balance, we assessed whether there are existent work-life balance policies, whether there are flexible work arrangements in place, and if there are support systems to uphold the policies.

At IEDC, work-life balance policies exist, but are mainly informal, and relate to the national legislation. At Vistula, there are no clear work-life balance policies, apart those that aim for process improvement and technology solutions development for mundane administration. At

WSB, there is a strong emphasis on work-life balance, while RTU connects it to increasing employee satisfaction.

IEDC, WSB and RTU encourage flexible and remote work arrangements, while Vistula does not mention it.

RTU specifies the introduction of support systems for those employees that have care obligations, and even arranges the short-time babysitting opportunities at the university. IEDC and WSB vaguely mention the parents and caregivers with no specific actions, while Vistula does not.

- *Gender Balance in Leadership & Decision-Making*

Table 7: Gender Balance in Leadership & Decision-Making at four EQUATION institutions

Institution	Targets for Women in Leadership	Mentorship & Career Progression
IEDC	Aims for 40% female representation	Aims to develop coaching support for women in career progression.
Vistula University	Aims for gender balance in various university roles over specific time intervals, not specified further, no actions anticipated.	Mentorship program to support career development of women researchers and staff.
WSB University	Aims for gender balance in governing bodies (which is achieved as they show in numerical representation)	Extensive analysis of gender balance at various university levels.
RTU	The recommended gender representation is 40 % of women.	Inclusion of a separate module in the leadership training program for managers and the training program for new managers. Creation of support mechanisms for career advancement at RTU corresponding to the organizational unit and position.

The existence of targets for women in leadership and decision making were checked, as well as whether there is a mentorship programme or other career progression incentives in place at specific institutions.

Both IEDC and RTU aim for the 40% of women in decision-making bodies and leadership positions. Vistula and WSB mention the aims for achieving gender balance in governing bodies, with Vistula not specifying any further actions, but WSB presenting a comprehensive analysis of the women's representation across various university roles.

IEDC, Vistula and RTU all anticipate conducting mentorship for women at various career stages, coaching mechanisms (IEDC) or leadership training programme for women (RTU).

- *Gender Equality in Recruitment & Career Progression*

Table 8: Gender Equality in Recruitment & Career Progression at four EQUATION institutions

Institution	Transparent Hiring Policies	Bias Mitigation Measures
IEDC	Not formalised.	<p>Mentoring programme for fast-tracking the academic careers of young female academics.</p> <p>Quotas or preferences of hiring or promoting female candidates are informally considered, as is the minimum presence of women in selection/hiring committees.</p>
Vistula University	Aims to ensure efficiency of an organisation friendly to staff and students and to conduct an analysis of management processes.	Not mentioned.
WSB University	Not mentioned.	Aims for trainings on unconscious bias, makes a case for the gender-sensitive language.
RTU	<p>Inclusion of gender equality aspects in the selection, career advancement, salary determining, and related personnel management processes.</p> <p>Concrete measures on the reduction of salary differences:</p> <ul style="list-style-type: none"> - Clarification of similar positions (development and introduction of a new Job Catalog) - Mutual matching of remuneration systems for academic, scientific, and general personnel and development of a uniform system. - Analysis of salary ranges for the same or equal positions, reduction of differences. - Regular analysis of salary differences for women and men and respective planning. 	<p>Concrete measures to raise awareness of equal opportunities and attitudes at the university:</p> <ul style="list-style-type: none"> - Inclusion of gender equality principles in career advancement and the related processes (formation of a career path), - Consultative support to the heads of organizational units on gender equality promotion issues.

In the field of recruitment and career progression, we checked whether institutions anticipate measures for transparent hiring practices and bias mitigation.

Regarding transparent practices, nor IEDC, Vistula, nor WSB anticipate any measures, apart from Vistula emphasising the strides towards staff and student-friendly University (with no specific measures mentioned). In this regard, RTU is much more advanced in comparison to other three institutions, mentioning the inclusion of gender equality aspects in the selection, career advancement, salary determining, and related personnel management processes, as well as concrete measures on the reduction of salary differences.

In terms of mitigation bias, institutions employ various measures. IEDC introduced fast-track mechanisms targeted to young female academics, and informally considers minimum presence among hiring candidates and in selection committees. WSB offers to organise trainings on unconscious bias, and makes an argument for the benefits of gender-sensitive language. RTU anticipates concrete measures to raise awareness of the importance of equal opportunities and attitudes at the university.

- *Integration of Gender in Research & Teaching*

Table 9: Integration of Gender in Research & Teaching at four EQUATION institutions

Institution	Gender in Research	Gender in Curriculum
IEDC	Gender dimension encouraged but not mandatory	No curriculum guidelines
Vistula University	Integration of ethical considerations into research methodologies and academic development programs	Aims to develop comprehensive curriculum on professional ethics
WSB University	Not mentioned.	Not mentioned.
RTU	Not mentioned.	Not mentioned.

The integration of gender dimension or perspective in curricula or research is the area most underdeveloped with RTU and WSB not including this area in their GEPs at all, and IEDC and Vistula only making non-specific suggestions. Vistula aims to develop the concept of ‘professional ethics’, but does not specify how gender equality relates to it.

- *Measures Against Gender-Based Violence & Harassment*

Table 10: Measures Against Gender-Based Violence & Harassment at four EQUATION institutions

Institution	Policies in Place	Support Mechanisms
IEDC	Sexual harassment regulated on a national level in the Employment Relationships Act.	Not mentioned.
Vistula University	Mechanisms for reporting gender-related concerns and incidents are established	The position of Equal Treatment and Anti-Discrimination Officer

WSB University	Zero-tolerance policy for any form of violence based on gender, formalized by internal acts and procedures, i.e. the Internal Anti-Mobbing Policy and Anti-Discrimination Policy (May 17, 2018) and the WSBU Employee Code of Ethics.	Aims to appoint a Plenipotentiary for gender equality and the policy against sexual harassment and other forms of gender-based violence. Complaint and grievance mechanism.
RTU	Not mentioned.	Awareness-raising and educational programmes anticipated.

In the field of the prevention of gender-based violence and sexual harassment, WSB made greatest strides towards its elimination, boasting with three internal acts regulating this, and also establishing a complaint and grievance mechanism. IEDC leans on the national legislation mandating the prevention of sexual harassment in the workplace, while Vistula established institutional mechanisms for reporting any gender-related concerns, and the position of Equal Treatment and Anti-Discrimination Officer.

Recommendations for Strengthening GEP Implementation

There are some variations in how institutions implement their GEPs. While WSB University and IEDC have made progress in structuring their gender policies, RTU and Vistula University need clearer frameworks, accountability mechanisms, and dedicated resources.

Based on this comparative assessment, the following recommendations are proposed:

Process-based factors:

- **Improve structure:** All GEPs should include all 4 mandatory and 5 recommended areas highlighted by the EC. Each action should have a timeline, objective, and KPI.
- **Increase specificity:** All partners need to work on the language used in their reports, which is at times very vague and thus bears the potential of no progress being made.
- **Enhance accountability:** partners should allocate persons in charge of each area or mechanism.
- **Add progress tracking:** Progress tracking needs to be highlighted and improved across all partners. This increases transparency and areas to work on.

Content-based factors:

- **Work-life balance & organisational culture:** introduce structured policies supporting flexibility and caregiver support,
- **Decision-making:** introduce structured mentorship programs and clearly defined gender parity targets,
- **Career progression:** introduce transparent hiring policies and unconscious bias training for hiring committee,
- **Gender in research/curricula:** mandate gender integration in research and develop curriculum inclusion policies,
- **Prevention of sexual harassment:** establish clear reporting procedures and victim support structures.

On the basis of this recommendation for improvement, we have developed core elements and detailed aspects in the GEIP model. In recognition of the diverse characteristics inherent in each institution, we advocate for a context-based tailored plan.

4.4 Designing a Context-Based Tailored Plan

One of the key challenges in gender equality policy implementation is adapting guidelines that stem from Western European institutions to the specific conditions of Eastern European higher education and research institutions. Recognizing these contextual differences, our approach acknowledges that institutions operate in diverse legal, political, cultural and academic landscapes, thus requiring tailored solutions. As such, in the GEIP, which serves as an evaluation of the current GEP, the identification of regional priorities and obstacles to gender equality and diversity strategies is emphasised in partner institutions, and ensured that the GEP integrates institution-specific priorities while aligning with broader EU frameworks.

A key aspect of tailoring a GEP is conducting a comprehensive gender audit to assess the existing policies, practices, and culture related to gender equality. The audit should also include the chapter on national legislation that already regulates some aspects of gender equality, and on national culture that might hinder or support institutional efforts towards gender equality. This audit helps identify specific gender gaps, barriers to progress, and potential areas for intervention. Once these gaps are identified, institutions can formulate targeted strategies that address their unique challenges.

Another crucial factor in designing a tailored plan is stakeholder involvement. Effective gender equality measures require the participation of a wide range of actors, including academic and administrative staff, students, leadership, and external partners. By incorporating diverse perspectives into the planning process, institutions can ensure that their GEPs are not only relevant but also more likely to gain institutional support and foster meaningful change. Co-creation workshops, interviews, and participatory decision-making processes can be valuable tools in this regard.

Institutional culture (which may match or transcend the broader national culture) plays an important role in the success of gender equality initiatives. A context-based approach considers how deeply entrenched gender norms and power structures influence the implementation of gender equality policies as they are embedded in institutional decision-making, career advancement systems and workplace dynamics. Therefore, in GEIPs we should aim to implement gender equality policies that are not just a procedural requirement, but a cultural change of norms and power structures.

Another vital element of a context-sensitive approach is the adaptation of monitoring and evaluation mechanisms. While standardized indicators are useful for tracking progress, they should be complemented with qualitative assessments that capture the experiences of those affected by gender equality initiatives. Collecting intersectional data—considering factors such as age, ethnicity, disability, and socio-economic background—allows for a more nuanced understanding of gender disparities and the effectiveness of interventions.

4.5 Core Elements of GEIP

The GEIP framework is structured around two essential components: effective Gender Equality Plans (GEPs) and sustainable GEPs. These two dimensions ensure that institutional

commitments to gender equality are not only established with clear objectives but are also embedded within organizational structures for long-term impact.

Part A: Effective GEPs

The first part of the GEIP focuses on effective GEPs. It provides a structured assessment of institutional adherence to the European Commission's mandatory and recommended guidelines for gender equality in research and higher education institutions. This assessment includes core topical areas such as work-life balance and organizational culture, gender balance in leadership and decision-making, gender equality in recruitment and career progression, the integration of the gender dimension into research and teaching content, and measures against gender-based violence, including sexual harassment. Institutions are encouraged to use this section as a practical guide to evaluate the alignment of their existing policies with these areas, identifying gaps and opportunities for improvement. This part of the GEIP also introduces a systematic methodology for goal setting, ensuring that institutions move beyond rhetorical compliance and actively implement structured, measurable, and time-bound strategies. Each goal is supported by a set of key activities, performance indicators, accountability structures, and a timeline for implementation. The process involves reviewing existing rules and policies, engaging stakeholders through consultations, developing concrete measures, and continuously evaluating progress.

Part B: Sustainable GEPs

The second part of the GEIP, dedicated to sustainable GEPs, shifts the focus toward institutional capacity-building and long-term commitment to gender equality. Sustainability is ensured through the integration of gender equality into core strategic documents, the availability of dedicated resources, the presence of a well-defined core team of change agents, the systematic collection of gender-disaggregated data, and the establishment of transparent monitoring mechanisms. This part employs the Impact Drivers Model, which provides a benchmarking framework for institutions to evaluate their progress across different stages of gender equality integration. These stages range from initial awareness and engagement to full institutionalization, where gender equality principles are embedded in governance structures, policies, and daily institutional operations. Sustainability also requires leadership buy-in and a formal commitment from top management, ensuring that gender equality is not treated as an isolated initiative but as an integral part of the institution's overall strategic vision.

By linking effective implementation with long-term sustainability, the GEIP provides a holistic framework that enables institutions to create gender equality strategies that are both actionable and enduring. The approach recognizes that meaningful change occurs at multiple levels, from policy formulation to grassroots engagement, and that institutional transformation requires persistent efforts to embed gender-sensitive practices into the very fabric of academia. Through a combination of goal-oriented planning, stakeholder engagement, and continuous evaluation, the GEIP serves as a vital tool for driving gender equality in higher education and research institutions.

5. Conclusion

In order to achieve lasting change in gender equality, it is essential that top management provide unwavering support, that dedicated resources are allocated, and that focus is given to symbolic, institutional, interpersonal, and personal change levels. While EU-funded projects can initiate progress, the pursuit of gender equality is an ongoing process influenced by evolving societal dynamics. Resistance is an inherent part of this journey, and understanding its dynamics is crucial for the effective implementation of gender mainstreaming.

In this Guidelines, we advocate a GEIP model as a mechanism for reinforcing and revitalising an institution's extant Gender Equality Plan (GEP). The primary objective and innovation of the GEIP is to reinvigorate stagnant gender policies, overcome gender fatigue, and advance the objectives in a manner that is both effective and sustainable. The GEIP model assists in evaluating the status of gender equality strategies, identifying stagnation points, and delivering bespoke solutions specific to the institutional context. The model aims for an effective intervention that is context-sensitive, addressing the unique socio-institutional milieus of different organisations. By combining theoretical insights with practical experiences from the EQUATION project, the GEIP offers an adaptive framework for overcoming gender policy stagnation, addressing gender fatigue, and ensuring that institutions continuously evolve their gender equality strategies.

A comparative analysis of IEDC-Bled School of Management, Vistula University, WSB University, and Riga Technical University (RTU) was undertaken to highlight the varying degrees of progress and implementation gaps across institutions. While some have demonstrated strong leadership endorsement, resource allocation, and structured monitoring, others still need clearer accountability mechanisms, dedicated resources, and robust monitoring systems to ensure sustainable impact.

A significant challenge in implementing gender equality policies is adapting guidelines from Western European institutions to suit the specific conditions of Eastern European higher education and research institutions. Recognising these contextual differences, our approach acknowledges that institutions operate in diverse legal, political, cultural and academic landscapes, thus requiring tailored solutions.

In the GEIP, which serves as an evaluation of the current GEP, the identification of regional priorities and obstacles to gender equality and diversity strategies is emphasised at partner institutions, and it is ensured that the GEP integrates institution-specific priorities while aligning with broader EU frameworks. By embedding the GEIP within institutional frameworks, organisations can ensure that GEPs are not just formal compliance tools, but dynamic, action-driven roadmaps that drive effective and sustainable gender equality. The EQUATION project's methodology has demonstrated that context-based tailored strategies, stakeholder engagement, and continuous evaluation are key to long-term success.

Annex 1



Gender Equality Implementation Plan Template

Preamble

The template offers a preamble to a Gender Equality Implementation Plan (GEIP), outlining its aim, emphasizing the importance of inclusivity (and/or diversity, depending on our strategic goals and how we define them) within the university community. It includes the reference to the overarching strategy (usually a GEP), and defines its initial duration.

Then, the template offers a 'How to use section' to explain how it should be utilised.

The template is divided into two parts, part A and part B. Part A refers to Effective GEPs and Part B to Sustainable GEPs.

Part A:

We suggest to visit each of the areas and check the level of adherence to the mandatory and recommended areas put forward by EC.

Topical (recommended) areas, proposed by the EC:

1. Work-Life Balance and Organisational Culture
2. Gender Balance in Leadership and Decision-Making
3. Gender Equality in Recruitment and Career Progression
4. Integrating the Gender Dimension into Research and Teaching Content
5. Measures Against Gender-Based Violence, Including Sexual Harassment
6. Optional: Other areas

It is most likely that your institutional Gender Equality Plan has set out goals under each topical area derived from a needs-based assessment conducted initially at your institution. For purposes of reference, we have included below some general goals that are often included in GEPs.

If your institution is applying for or has received an HR4R award, it is important to align or integrate the GEP with other documents (e.g. Action Plan, Recruitment Policy, Excellence in Research Policy). From a holistic perspective, it is also worth noting the possibility of fully integrating sensitivity to gender equality with countering discrimination in other areas (based on disability, age, social and material status, views and beliefs, sexual orientation, etc.).

Some examples on goals within each of the areas:

1. Work-Life Balance and Organisational Culture
 - Develop flexible work policies that accommodate different needs.

- Promote a culture that values diversity and inclusivity through regular awareness programs and training.
- Implement regular surveys to monitor staff satisfaction and identify areas for improvement.

2. Gender Balance in Leadership and Decision-Making

- Set clear targets for gender balance in leadership positions and decision-making bodies.
- Create mentorship and leadership development programs specifically for underrepresented genders.
- Regularly review and adjust recruitment and promotion processes to remove bias.
- Implement surveys to monitor sense of empowerment and participation in internal stakeholder groups

3. Gender Equality in Recruitment and Career Progression

- Establish transparent criteria for recruitment and promotion that prioritize merit and potential.
- Implement unconscious bias training for all involved in the hiring process.
- Support career development opportunities for all genders, with special attention to underrepresented groups.
- Review and analyse internal documents, regulations and guidelines for job recruitment, professional evaluation, internal and external competitions in terms of equality standards

4. Integrating the Gender Dimension into Research and Teaching Content

- Encourage the inclusion of gender studies in the curriculum across departments.
- Provide training for staff on how to integrate gender perspectives into their teaching and research practices.
- Fund research projects that focus on gender issues or promote gender equality.
- Pay attention to the content on equality and non-discrimination in the guidelines for staff and the instructions for completing the syllabuses

5. Measures Against Gender-Based Violence, Including Sexual Harassment

- Develop a clear and inclusive policy against gender-based violence and harassment, with defined procedures for reporting and addressing incidents. Ensure the policy is accessible and visible to all members of the institution.
- Provide mandatory, regular training for students, staff, and faculty on recognizing, preventing, and responding to harassment and violence.
- Establish a confidential support system for victims, including counselling and legal assistance
- Include issues of monitoring undesirable behaviour/non-compliance with equality rules in anonymous surveys that are implemented

6. Other areas

- Developing guidelines on how to use gender-sensitive language in academic settings.
- Adhering to the principle of inclusivity in language by implementing the practice of using the gender-sensitive language in written and oral contexts
- Partner with local organizations or experts specializing in gender-based violence prevention and support
- Host awareness campaigns to foster a culture of respect and zero tolerance for harassment.
- Recognize and reward initiatives that promote gender equity and safety on campus
- Implement regular assessments of the effectiveness of policies and programs through surveys, focus groups, or external audits. Use feedback to continuously improve the institution's approach to preventing and addressing gender-based violence.

We then suggest to visit each of the goals set and check the following:

- What are the **detailed activities/measures**,
- Which are the **indicators** of successfully implemented goal,
- Which **target group** are taken into account (check whether the goal applies to other groups and if you can expand/adjust it so it takes account other groups as well - dimension of intersectionality: foreigners, young parents, non-language speakers, people in precarious positions etc.),
- Which are the **persons in charge** of implementing this goal,
- What is the set **timeline** for this goal to be achieved.

If there are no goals in a certain area to improve gender equality, you might want to think about whether you have missed certain areas unexplored and invisible and as such not preventing gender inequalities that might exist in this area.

If there are goals that do not suit either of the recommended areas, note them under ‘Other areas’.

The template then provides the option to evaluate the status of each goal, categorising it as either:

- Achieved as planned
- Achieved with modifications
- In progress
- Not yet achieved.

For each categorisation, a justification or explanation must be provided as to why the categorisation was made. Furthermore, if a goal has been categorised as ‘achieved as planned’ or ‘achieved with modifications’, evidence to substantiate this claim can be provided.

For example, in the Table 1 below, the institution X evaluated one of the goals under the area ‘Work-life balance and organisation culture’. The goal aimed at supporting the work life balance and it was assessed as being ‘In progress’. The institution identified a number of

activities designed to facilitate the achievement of the goal, together with an indicator that may be used for the purpose of benchmarking progress. The institution also identified the underlying reason for its slow implementation: the timeline and persons in charge were defined with insufficient clarity (it was set to be implemented by 2024 by Gender Equality & Diversity workgroup). The institution highlights the necessity for greater specification and the allocation of responsibility in order to achieve the desired goal. For this institution it would be advisable to allocate specific time and persons in charge for each of the three supportive activities.

Table 1: Example of how to evaluate the progress of a goal aimed at supporting work-life balance

Areas of Gender Equality	No.	Goal	Activities	Indicator	Persons in charge	Time	Assessment	Justify / explain assessment
1. WORK-LIFE BALANCE AND ORGANISATIONAL CULTURE	1,1	Supporting work-life balance by setting-up rules for flexible working hours and remote work.	1. Developing rules. 2. Publishing rules (on the intranet). 3. Providing clear information to faculty, staff.	Set and published rules for flexible working hours and remote work.	GE&D workgroup.	By 2024.	In progress	Time and persons in charge specified too vague, need more specification and responsibility allocation.

For all goals categorised as ‘In progress’ or ‘Not yet achieved’, the subsequent section, in the template designated as ‘Future plan’, is of paramount importance. It is here that the goals are further defined and specified, with supportive activities, persons in charge and an allocated, specified timeline. This enables the goals to be prepared for future achievement. The following table provides an illustration of how the aforementioned goal of supporting work-life balance can be developed and specified.

Table 2: Example on how to develop and specify a goal in a Gender Equality Implementation Plan

Goal	Future plan	Activities	Persons in charge	Time

Supporting work-life balance by setting-up rules for flexible working hours and remote work.		1. Reviewing existent rules on work-life balance in your institution. 2. Organising discussions/interviews with staff to assess what they need. 3. Developing rules. 4. Negotiating with leadership. 5. Finalizing the rules. Publishing rules (on the intranet). 7. Providing clear information to faculty, staff.	HR department, researcher in GE/diversity, gender equality officer, representative of leadership.	By 2024. 1. May 2024: reviewing existent rules. 2. June 2024: organise discussion with various groups at the institution: faculty, admin, students. 3. July: Developing rules. 4. September 2024: Negotiate with leadership. 5.+6. October: Finalize the rules and publish rules on the internet. 7. November 2024: Organise discussions and disseminate information to staff.
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Part B:

Part B refers to the Sustainable GEPs and process-related mandatory requirements. It follows the Impact Drivers Model developed by Lut Mergaert, Marina Cacace and Marcela Linková³ and is adapted for the EQUATION project partners.

In this part we check the mandatory areas and assess how far the institutionalisation of certain areas has progressed at your institution:

1. Core team of change agents
2. Institutional commitment to gender equality
3. Availability of resources
4. Trainings
5. Data collection and statistical analysis
6. Monitoring: transparency and accountability

For each of the impact drivers we suggest the following indicators:

Impact Drivers	Indicators
1. CORE TEAM OF CHANGE AGENTS (<i>Change agents refer to the people in charge of steering and facilitating the change process in the organisation.</i>)	A core team of change agents exists the size and composition of which are commensurate with the size and complexity of the organisation.
	The core team of change agents has a formal mandate and ownership over the endeavour.
2. INSTITUTIONAL COMMITMENT TO GE	GE is a priority in the strategic documents of the organisation.

³ Mergaert, L., Cacace, M., & Linková, M. (2022). Gender Equality Impact Drivers Revisited: Assessing Institutional Capacity in Research and Higher Education Institutions. In *Social Sciences* (Vol. 11, Issue 9, p. 379). MDPI AG. <https://doi.org/10.3390/socsci11090379>.

	There is an explicit and visible commitment of leaders to GE.
3. AVAILABILITY OF RESOURCES	Gender knowledge and internal expertise are available and used.
	There are funds dedicated to GE.
4. TRAININGS	There are trainings on GE issues.
5. DATA COLLECTION AND STATISTICAL ANALYSIS	Institutional gender disaggregated data are collected.
	Institutional gender disaggregated data and statistics are public and accessible.
	Intersectional gender disaggregated statistics are collected and published.
6. MONITORING: TRANSPARENCY AND ACCOUNTABILITY	GE is included in reports and assessment for internal monitoring.
	GE reporting is done and is publicly available.
	Incentives and/or sanctions are in place.

Table 3: Example of evaluating the mandatory process-related goals in Gender Equality implementation Plan

Impact Drivers	Indicators	Assessment	Justify / explain assessment
INSTITUTIONAL COMMITMENT TO GE	GE is a priority in the strategic documents of the organisation	Achieved as planned	<i>GE is a priority consistently included in the strategic documents of the organisation</i>

	There is an explicit and visible commitment of leaders to GE	Achieved with modifications	<i>The leaders of the organisation frequently consider GE in their public discourse and internal authoritative messages, and there is a certain commitment to GE</i>
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In light of the above-mentioned considerations, an assessment of the goals set forth in the Gender Equality Plan has been conducted. The status of each goal has been determined, distinguishing between those that have been achieved (either as planned or with modifications), those that are in progress, and those that have not yet been achieved. With regard to the final two categories, the Implementation Plan enables us to gain insight into the reasons why the goal has not been achieved, thus allowing us to identify potential solutions. In light of this, we present a novel approach to determining the optimal direction for our activities, with the aim of revitalising the stale gender policies, overcome the gender fatigue, and advance the goals in a manner that is both effective and sustainable.

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