



INSPIRE

D2.2 Southern country cluster report

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List of Acronyms

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



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1 Introduction

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

INSPIRE survey

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

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

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

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

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

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

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



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

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

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

Country cluster report

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

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

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

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

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



2 Legal and policy framework

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

2.1 Legal Framework

2.1.1 Gender equality in R&I

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

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

Spain

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



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

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

Greece

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

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



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

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

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

Cyprus

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

2.1.2 Non-discrimination

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

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

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

⁴ <https://www.equalitylaw.eu>



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

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

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

2.2 Policy Framework

2.2.1 Gender equality in R&I

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

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

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

⁵ <https://gil4w.eu>



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

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

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



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

2.2.2 Intersectionality

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

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

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

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

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



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

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

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

2.2.3 Gendered innovations

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

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



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

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

2.3 Assessment of current legal and policy framework

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

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

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

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

Country	Initiating change	Sustaining and deepening change	Adopting an intersectional approach	Implementing gendered innovations	Monitoring inclusive gender equality
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⁶ https://www.mlsi.gov.cy/mlsi/dlr/dlr.nsf/nationalcertificationbody_en/nationalcertificationbody_en

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



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



3 Structural change

Overview of GEP uptake

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

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

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

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



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

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

Socio-cultural, political and economic context

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

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

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



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

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

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

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



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

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

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



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

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

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

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

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



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

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

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

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

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



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

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

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

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

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

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



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

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



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

3.1 Literature review and assessment

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

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

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

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



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

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

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

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

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

3.2 Initiating change

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

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

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



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

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

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

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

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



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

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

3.3 Sustaining and deepening change

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

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

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

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



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

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

3.4 Intersectionality

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

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

3.5 Gendered innovations

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



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

3.6 Data monitoring

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

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

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

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



4 R&I organisations

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

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

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



5 Engaged stakeholders

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

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

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

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

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

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



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

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

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

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

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

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

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



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

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

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

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

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

Table 11. Suggestions for supporting Communities of Practice

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



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



6 Training resources

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

Table 12. Training resources in English

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



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

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

Table 13. Training resources in national languages

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



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



7 Conclusions

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

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

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

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

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

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

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



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

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

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

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



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