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LIST OF ACRONYMS

Abbreviation	Meaning
AC	Associated Countries
CoP	Community of Practice
EIGE	European Institute for Gender Equality
ERA	European Research Area
EU	European Union
GBV	Gender-Based Violence
GE	Gender Equality
GEI	Gender Equality Index
GEP	Gender Equality Plan
HE	Higher Education
HEI	Higher Education Institutions
MS	EU Member States
NIP	National Impact Plan
RFO	Research Funding Organisation
RPO	Research Performing Organisation
R&I	Research & Innovation
SII	Summary Innovation Index
WP	Work Package



EXECUTIVE SUMMARY

Gender equality has been one of ERA's priorities for more than a decade. In 2021 most Member States and Associated Countries renewed and reinforced their commitment to gender equality by endorsing the **Ljubljana Declaration**. With the Ljubljana Declaration, the main stakeholder in R&I (EC, MS/AC) agreed on the directions of further development: to address gender-based violence, to move from a gender oriented to an intersectional approach to gender equality and to focus on GEPs as the most significant instrument to achieve sustainable progress towards gender equality in R&I. The Ljubljana Declaration is a main reference in the **ERA Policy Agenda** – specifically in **ERA Action 5** focusing on gender quality and inclusiveness. In total 18 Member States committed themselves to ERA Action 5: Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Ireland, Italy, Lithuania, Netherlands, Poland, Portugal, Slovenia, Spain and Sweden.

This commitment to ERA Action 5 has been expressed by a written statement from MS/AC. Compared to the previous ERA period (2015-2020), there is now a more detailed description provided by the European Commission of what is expected from Member States which are committed to pursue gender equality and inclusiveness. However, as there is no requirement to formulate a national action plan as in the previous ERA period, there is only limited information available regarding MS/AC priorities, objectives and planned or implemented measures.

The situation resulting from the comprehensive gender equality goal formulated in ERA Action 5 and the lack of comparable data is highly complex and calls for an accompanying monitoring and continued development of a common gender equality discourse. On the one hand, it is important to know more about the gender equality objectives and policies formulated at national level as well as how concepts are used (e.g. gender, intersectionality). On the other hand, it is necessary to have more detailed information about policies implemented at national level as well as related outcomes. A policy discourse based on this information may support the development of a common understanding of gender equality concepts and objectives. Furthermore, a monitoring of policy implementation allows to identify good practices at national level which supports exchange of experiences and mutual learning.

GENDERACTIONplus proposes qualitative indicators for a monitoring of ERA Action 5 implementation focusing on the following dimensions:

- Commitment to gender equality and inclusiveness
- Formulation of gender equality objectives
- Gender equality measures planned and implemented
- Availability of a monitoring of policy implementation

It is proposed to implement a survey among members of ERA Forum subgroup on gender equality and inclusiveness to collect information regarding ERA Action 5 implementation at national level.



1. INTRODUCTION

1.1. About the project

Building on the Horizon 2020 project GENDERACTION, the overall goal of GENDERACTIONplus is to contribute to the coordination of the gender equality and inclusiveness objectives of the new European Research Area (ERA) through the development of two communities of practice (CoPs), one consisting of representatives of national authorities and the second consisting of representatives of Research Funding Organisations. The network is made up of a total of 22 EU Member States (MS) and 3 Associated Countries (AC), as well as 26 project partners and 14 Associated partners.

Adding the plus sign to the title of the previous GENDERACTION project not only indicates that it is a follow-up project but also makes it explicit that this project also addresses diversity and intersectionality (the gender+ approach).

Specifically, the GENDERACTIONplus project aims to:

- Develop strategic policy advice on existing and emerging policy solutions;
- Enhance the policy-making process by engaging with stakeholders, civil society organisations, and citizens;
- Build capacities, competence, and expertise for gender equality and mainstreaming in Research & Innovation among the policy and RFO community members, with special attention to countries with less comprehensive policies;
- Create impact through communication, dissemination, and exploitation.

Thematically, the project focuses on:

- Intersectionality and inclusiveness
- Gender-based violence (GBV)
- The gender dimension in research and innovation
- Monitoring and evaluating gender equality actions in the European Research Area (ERA)
- Promoting institutional change through Gender Equality Plans (GEPs)

GENDERACTIONplus aims to achieve the following impacts:

- Advance policy coordination among MS and AC countries and through stakeholder and citizen engagement.
- Improve research careers and working conditions in European R&I, by developing policy dialogue and solutions on inclusion and intersectionality, combatting gender-based violence, and promoting institutional changes through GEPs.
- Improve research quality and the social responsibility of knowledge by integrating the gender dimension into research and innovation (R&I).
- Reduce geographic inequality by targeting less experienced/engaged countries and regions.



1.2. Objectives of the report

This first report of WP5 aims at providing a framework for the monitoring of ERA action implementation at national level. Its main objectives are to:

- develop a set of indicators for the monitoring of ERA action implementation at national level which will serve as a basis to analyse policy implementation and progress towards gender equality in R&I.
- create awareness regarding the relevance of a monitoring for policy steering at national as well as European level.
- provide an input for mutual learning and capacity building activities focusing on using monitoring as a steering instrument to support policy implementation.

The report builds on the framework and indicators developed in WP3 of the GENDERACTION project (see Wroblewski 2021¹). GENDERACTION argued that a meaningful set of indicators represents the potential support policy implementation and pointed out to the risk of ineffective policy implementation and false conclusions if indicators are used which do not represent relevant gender equality dimensions considered by concrete policies.

The first report of GENDERACTIONplus WP5 aims at building on and further advancing the set of indicators developed in GENDERACTION to address the current ERA policy agenda objectives – especially new topics like intersectionality, gender-based violence and the implementation of gender equality plans (GEPs) following the criteria formulated in the context of Horizon Europe. The argumentation will be illustrated with concrete examples from selected Member States for which information is available.

Unfortunately, the first GENDERACTIONplus WP5 report can only refer to limited empirical evidence. The current ERA policy agenda does not require that Member States and Associated Countries submit strategic policy documents focusing on the implementation of concrete measures for the selected priorities. Hence, this first report is based on available information – mainly results of the benchmarking exercise conducted in WP2, WP3, WP4 and WP6 as well as desk research. Primary data collection as well as secondary data analysis will be used for the second report.

1.3. The relationship of this report to other tasks and work packages

The work conducted in WP5 already served as an input for the webinar “Relevance of a national policy discourse in R&I” which took place in April 2023. The aim of the webinar was to discuss the relevance of a national policy discourse for the successful implementation of gender equality policies in R&I. The webinar was the first interaction with stakeholders (members of the policy CoP and the RFO CoP) to raise awareness for the relevance of monitoring and a policy discourse. Thereby, WP5 also supports the development of national impact plans (WP8) as participants should become familiar with what is meant by a gender equality discourse and what are central elements of a gender equality discourse. They should become aware of the relevance of a comprehensive national policy discourse for a successful implementation of gender equality policies in R&I at national level. It is planned to organise

¹ https://genderaction.eu/wp-content/uploads/2021/09/GENDERACTION_WP3_final_report.pdf



a follow-up workshop for members of the policy CoP to support the development of the national impact plans (NIPs).

Furthermore, it is planned to discuss the proposed set of indicators with members of the policy CoP and other relevant stakeholders during the second year of project implementation. This discussion aims at creating a shared understanding of the relevance of a monitoring for the implementation of gender equality policies at national and European level.

1.4. Structure of the report

The first report of WP5 provides the framework for a monitoring of ERA Action 5 implementation at national level. The report consists of three main parts:

- In a first step the development of gender equality objectives in ERA is presented. For the current ERA period the governance structure is described-
- Secondly, the status quo regarding gender equality in ERA is described based on available statistics. In this section we also focus on missing data – especially regarding the implementation of policies.
- Based on that the GENDERACTIONplus approach to monitoring is presented and a first set of indicators in proposed.

The report concludes with first a summary of the main findings and suggested next steps.



2. Gender Equality Objectives in ERA

2.1. Gender Equality as a priority in ERA

The political concept of the European Research Area (ERA) was first launched in 2000 with the publication of the European Commission's "Towards a European Research Area" Communication (EC 2000). The main objectives of this initiative were to boost Europe's competitiveness, to improve the coordination of research activities on both a national and a European level, to develop human resources and to increase the attractiveness of European research to the best researchers from all over the world. The EU's Framework Programme for Research, Technological Development and Demonstration was considered to be the most important instrument for the implementation of the European Research Area.

In 2007, progress in the development of the ERA was assessed and new perspectives presented in the form of a Green Paper (EC 2007). The Green Paper underlines the importance of ERA for the European Union to become a leading knowledge society. It also confirmed the main ERA objectives. "The ERA concept encompasses three inter-related aspects: a European 'internal market' for research, where researchers, technology and knowledge can freely circulate; effective European-level coordination of national and regional research activities, programmes and policies; and initiatives implemented and funded at European level" (EC 2007: 5). In December 2008, the Competitiveness Council formulated a 2020 Vision for the European Research Area which was endorsed by the European Council (Council of the European Union 2008). The outlined vision of the ERA is based on six dimensions, namely: realising a single labour market for researchers; developing world-class research infrastructures; strengthening research institutions; sharing knowledge; optimising research programmes and priorities; and opening to the world through international cooperation in science and technology (S&T).

A third phase in the development of the ERA began in 2012 with the new Communication and Council Conclusions (EC 2012), which led to the adoption of the ERA Roadmap 2015-2020 (ERAC 2015). The purpose of the roadmap was to identify a limited number of top priority actions that will have the biggest impact on Europe's research and innovation whilst fully recognising that national research and innovation systems across Europe have different characteristics and specificities. It was up to the Member States to identify and decide which approaches to pursuing the ERA are most suited to the structures and dynamics of their own national research and innovation systems in the implementation of these actions (Council of the European Union 2015: 3). The ERA Roadmap also made provisions for monitoring in conjunction with ERA Progress Reports (for a critical discussion of this approach see Wroblewski 2021).

The ERA Roadmap 2015-2020 defined six priorities for policies to pursue ERA at national level:

- Priority 1 – Effective national research systems
- Priority 2a – Jointly addressing grand challenges
- Priority 2b – Making optimal use of public investments in research infrastructure
- Priority 3 – An open labour market for researchers
- Priority 4 – Gender equality and gender mainstreaming in research
- Priority 5 – Optimal circulation and transfer of scientific knowledge



- Priority 6 – International cooperation.

Priority 4 defined three dimensions of gender equality: (1) the representation of women in science in general, (2) the representation of women in decision-making positions as well as structural and cultural barriers which lead to an underrepresentation of women in decision making, and (3) the integration of gender in research content. In the years that have since followed, the European Commission and the Council of the European Union refer to this definition of gender equality – e.g. in the Council Conclusions on the European Research Area Roadmap (2015) or in the recent ERA Progress Report (EC 2019).

The first dimension has already been addressed by the EC Communication “Women in Science” (EC 1999), a policy document which formulates the aim to “encourage women to take part in European research” (EC 1999: 3). The European Commission (EC) also envisaged the development of a coherent approach to increase the share of women in its Fifth Framework Programme (FP5, 1998-2002). This approach included the Marie Curie scholarships as well as corresponding advisory groups and assessment/monitoring panels aimed specifically at promoting research by, for and on women. In other words, its goal was not only to increase female participation in research but also to strengthen gender issues in research content (“research for women” and “research on women”). In the third phase of the development of the ERA (see, e.g. EC 2012; Council of the European Union 2012), the focus of the gender dimension in the ERA has been widened and formulated more explicitly. Gender equality and gender mainstreaming in research is defined as one of six ERA priorities “to end the waste of talent which we cannot afford and to diversify views and approaches in research and foster excellence” (EC 2012: 4).

In September 2020 the European Commission launched the Communication “A New ERA for Research and Innovation” which reinforced its commitment to gender equality in order to strengthen the European R&I potential (EC 2020). The Council of the European Union also formulated a strong commitment to gender equality in R&I with its conclusions from December 2020 and May 2021. The Council conclusions focused on gender equality in the context of research careers as well as the development of inclusive gender equality plans at RPO level which also address the gender dimension in R&I. The Council defined the element of inclusiveness as a broad, gender-balanced and non-discriminatory participation of researchers and national and regional actors and R&I stakeholders across Europe in ERA activities. Furthermore, the first strategic plan for Horizon Europe considers gender equality as a crosscutting priority and foresees supporting actions strengthening the ERA through the promotion of inclusive gender equality (EC 2021b). In July 2021 a joint conference of Slovenian Presidency of the Council of the EU and European project GENDERACTION took place which provided the opportunity to reflect on developments during the ERA period 2016-2020 and upcoming challenges regarding gender equality in R&I.²

In autumn 2021, the framework for the new ERA including a commitment to strengthen and further develop gender equality policies was approved by the Council of the European Union, the EC as well as MS/AC. An important element of this reinforced commitment to gender equality represents the

² For a summary of the discussion see: https://genderaction.eu/wp-content/uploads/2021/07/PR_DeepeningERA_Through_Gender_Equality.pdf



Ljubljana Declaration on Gender Equality in Research and Innovation³ which prepared by the two Presidency Trios (DE, PT, SI and FR, CZ, SE) and presented by the Slovenian Presidency to Member States in the Competitiveness Council of 28 September 2021. The Declaration reaffirms the commitment of the Member States and the European Commission to the implementation of gender equality and gender mainstreaming in the new ERA and outlines priority areas to be addressed to foster an inclusive ERA for all. The priority areas underlined by the Ljubljana Declaration are the following:

- Ensure fair, open, inclusive and gender equal career paths in research, and consider intersectional perspectives on gender inequalities;
- Facilitate mutual learning opportunities through form-follows-function robust governance;
- Employ existing and newly developed tools, such as Gender Equality Plans, to facilitate systemic institutional change and remove institutional barriers;
- Address and counteract gender-based violence;
- Support active monitoring and evaluation to ensure continuous improvement;
- Leverage synergies to enhance gender equality achievements within the ERA, but also within complementary fields such as the European Higher Education Area, Cohesion policy funds, innovation ecosystems, as well as in international cooperation.
- Underpinning the above priorities and activities, fully acknowledge gender mainstreaming as a horizontal principle.

With the Ljubljana Declaration, the main stakeholder in R&I (EC, MS/AC) agreed on the directions of further development: to address gender-based violence, to move from a gender oriented to an intersectional approach to gender equality, and to focus on GEPs as the most significant instrument to achieve sustainable progress towards gender equality in R&I. As of the Competitiveness Council of 26 November 2021, the Ljubljana Declaration was endorsed by 25 of the 27 Member States, 11 other countries (including 10 Associated Countries or candidate countries), Switzerland and the European Commission. UK, Turkey and Australia did not officially endorse it but expressed explicit support for it.

The Ljubljana Declaration referred to the **Pact for Research and Innovation in Europe**. The Council of the European Union approved the Pact for Research and Innovation and established the **ERA Policy Agenda** as the document which sets out the ERA Actions to be implemented jointly and voluntarily in a coordinated and flexible manner (Council of the European Union 2021a). The Pact for Research and Innovation as well as the ERA priorities set out in the Pact addresses challenges faced by EU and national R&I communities and society. In total, 18 ERA Actions have been defined focusing on its implementation at the European and/or national level. The first ERA Policy Agenda (2022-2024) was approved by the Council as an Annex to the Council Conclusions on the Future Governance of the ERA on 26 November 2021 (Council of the European Union 2021b).

Each MS/AC expressed its commitment to the ERA actions in which they decide to participate. MS/AC have been asked to express their commitment till 30 June 2022. The following ERA actions have been defined (EC 2021a):

- Open Science including through EOSC (action 1)

³ https://www.gov.si/assets/ministrstva/MIZS/Dokumenti/PSEU/Ljubljana-Declaration-on-Gender-Equality-in-Research-and-Innovation- endorsed_final.pdf



- Copyright and data legislative framework (action 2)
- Research assessment (action 3)
- Promote active research careers (action 4)
- Promote gender equality and foster inclusiveness (action 5)
- Academic freedom (action 6)
- Knowledge valorisation (action 7)
- Strengthen research infrastructures (action 8)
- Global approach (action 9)
- Missions and partnerships (action 10)
- Green transformation (action 11)
- Accelerate the green and digital transition (action 12)
- Empower higher education institutions (action 13)
- Bring science closer to citizens (action 14)
- Improve EU-wide access to excellence (action 16)
- Enhance public research institutions' strategic capacity (action 17)
- ERA monitoring (action 19)
- Future R&D investment (action 20)

Compared to the previous ERA period (2015-2020) ERA actions are more detailed and comprehensive than the priorities in the ERA roadmap. In the previous period MS/AC were asked to define their concrete commitment in a national ERA roadmap (action plan) but it was expected that all 6 priorities were addressed. Now MS/AC have more leeway to decide on their priorities, but their commitment refers to a set of clearly defined expectations regarding the implementation of related actions. For example, action 5 “Promote gender equality and foster inclusiveness, taking note of the Ljubljana Declaration” consists of 8 sections description/background/rationale, main actors responsible for the implementation of the action, a timeframe and milestones, funding possibilities, expected impact, monitoring, communication and additional information. For ERA Action 5 four interlinked outcome deliverables are proposed (Council of the European Union 2021b: 16):

1. Develop a policy coordination mechanism to support all aspects of gender equality through inclusive Gender Equality Plans and policies, and a dedicated EU network on their implementation.
2. Strategy to counteract gender-based violence including sexual harassment in the European R&I system and to assure gender equality in working environments through institutional change in any research funding or performing organisation.
3. A policy approach to strengthen gender equality, that addresses gender mainstreaming to advance the new ERA.
4. Develop principles for the integration and evaluation of the gender perspective in research and innovation content in cooperation with national Research Funding Organisations.

By August 2022 the European Commission received written commitments to ERA actions from 26 Member States, four Associated Countries⁴, the Committee of the Regions and 17 stakeholder organisations (Council of the European Union 2022). 15 ERA actions passed the threshold defined in

⁴ Armenia, Georgia, Israel and Norway.



the Council Conclusions adopted in November 2021 (at least half of EU Member States support an ERA action).

Action 4 (research careers and mobility) and action 8 (research infrastructures) received most support. Action 5 (gender equality and inclusiveness) have been supported by 18 Member States, 2 Associated Countries and 9 stakeholder organisations.

The following figure gives an overview of commitments by Member States to ERA actions.

Figure 1: Commitments by Member States to ERA actions

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	16	17	19	20	Total
Austria (AT)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	13
Belgium (BE)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	18
Bulgaria (BG)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	7
Croatia (HR)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	4
Cyprus (CY)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	11
Czechia (CZ)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	18
Denmark (DK)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	13
Estonia (EE)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	18
Finland (FI)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	11
France (FR)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	16
Germany (DE)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	18
Greece (EL)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	6
Hungary (HU)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	14
Ireland (IE)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	6
Italy (IT)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	14
Latvia (LV)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	8
Lithuania (LT)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	14
Luxembourg (LU)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	0
Malta (MT)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	5
Netherlands (NL)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	16
Poland (PL)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	11
Portugal (PT)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	18
Romania (RO)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	8
Slovakia (SK)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	10
Slovenia (SI)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	10
Spain (ES)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	17
Sweden (SE)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	10
Total	23	12	22	24	18	15	17	24	19	23	17	19	16	16	15	9	16	9	

Source: Council of the European Union 2022: 2.



2.2. ERA Governance

Through the Pact for R&I and the Council Conclusions on the future governance of ERA, the Council and the Commission jointly developed a new governance for ERA with new modes of collaboration. The aim was to create more effective structures in order to drive change, especially through a better link between the European and national R&I policies and systems.

The **Council of Ministers** adopts or amends the ERA Policy Agenda and provides guidance on policy issues at ministerial level (Council Conclusions). Within the **ERA ministerial conference** in-depth discussions of specific ERA policies at ministerial level take place. The **European Research Area and Innovation Committee (ERAC)** is a main actor in the ERA context (Council of the European Union 2021c). ERAC is a strategic policy advisory committee that advises the Council, the Commission and Member States on the full spectrum of research and innovation issues in the framework of the governance of the ERA, including current and future ERA Policy Agenda/ERA Actions as well as Framework Programmes. ERAC is co-chaired by the European Commission (Director-General or a deputy Director-General) and an elected representative from the Member States. The members of the Committee are the Member States and the European Commission. Representatives of countries associated to the R&I Union Framework Programme, as well as of relevant third countries, external experts and stakeholders may be invited to relevant ERAC meetings.

ESFRI⁵, EOSC⁶ Steering Board and Partnership Knowledge Hub⁷ support the steering of specific policies relevant for the ERA.⁸

⁵ <https://www.esfri.eu/>

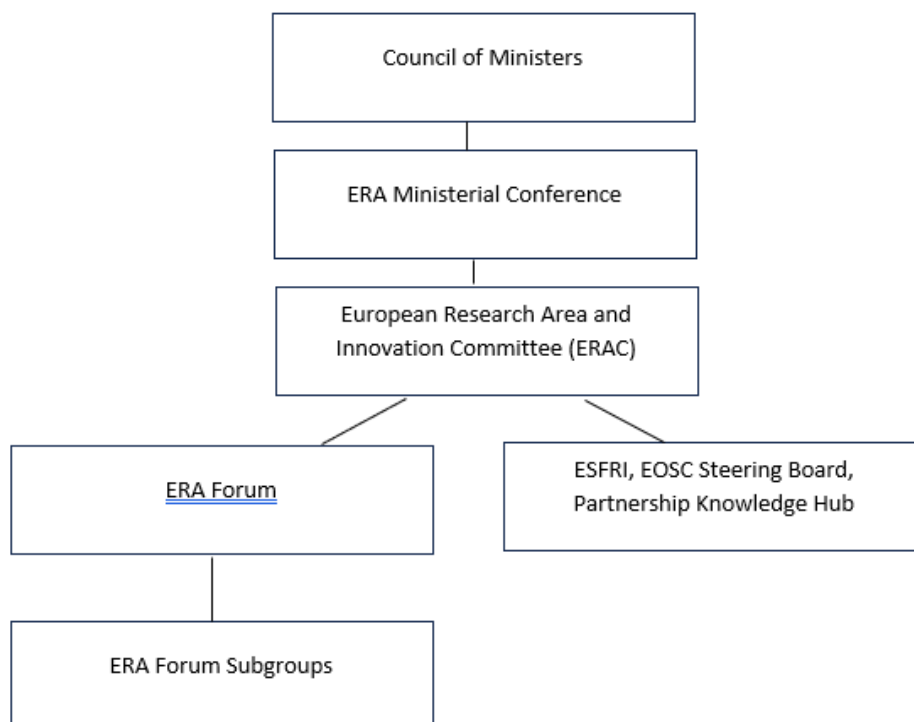
⁶ <https://eosc.eu/tripartite-collaboration>

⁷ https://international-partnerships.ec.europa.eu/knowledge-hub_en

⁸ ESFRI supports a coherent and strategy-led approach to policy-making on research infrastructures in Europe, and facilitates multilateral initiatives leading to the better use and development of research infrastructures, at EU and international level. The Competitiveness Council of November 2021 placed the development of the European Open Science Cloud (EOSC) at the top of the ERA Policy Agenda for 2022-2024 to enable the open sharing and reuse of research outputs. Partnership Knowledge Hub is intended to make the strategic coordinating process operational by establishing a formal structure for collaboration between the Commission and the authorities responsible for the national coordination and participation in EU R&I partnerships from Member States and Associated Countries.



Figure 2: ERA Governance



Source: ERA Portal Austria (www.era.gv.at)

The Council Conclusions on the future governance of the ERA of 26 November 2021 recognise the role of the ERA Forum as the body responsible for enhancing coordination towards the effective implementation of the ERA Policy Agenda, supporting the Commission and the Member States in the delivery of the ERA Actions. The ERA Forum is organised as a Commission expert group to which Member States and Associated Countries send representatives. The ERA Forum also involves stakeholder representatives in its work. The main tasks of the ERA Forum are the following:

- co-design and coordinate, between the Commission and the Member States, the preparation of Commission’s initiatives with regard to future updates of the ERA Policy Agenda, and discuss alignment with other policies;
- co-design and coordinate the implementation of the ERA Actions between the Commission, the Member States and, on a case-by-case basis, Associated Countries, stakeholders, as well as relevant third countries;
- analyse the monitoring and evaluation of the implementation of the ERA Policy Agenda through the ERA Scoreboard and the information provided through the ERA Policy Platform, and contribute to the Commission’s work in preparing a report to the Council;
- act as a facilitator for the preparation of additional candidate ERA Actions in variable geometry, with support from the Union where appropriate, as well as for the exchange of best practices on national ERA policies and measures.



The **ERA Forum** may establish subgroups to support the implementation of ERA Actions. To support the implementation of action 5 the **ERA Forum subgroup on inclusive gender equality** was established in spring 2023. Its crucial role is to communicate and mobilise national constituencies as well as stakeholders, including umbrella organisations.

2.3. MS/AC committed to gender equality in R&I

With the Ljubljana Declaration MS/AC recognise gender equality as a core EU value and gender mainstreaming as a core EU strategy. Furthermore, they acknowledge that Gender Equality Plans as the most significant instrument to achieve sustainable progress towards gender equality in R&I. The Ljubljana Declaration also formulates the need to better address gender-based violence in academic settings and to open gender equality policies to inclusiveness and intersections with other diversity categories and potential grounds for discrimination, such as ethnicity, disability and sexual orientation.

The following countries have endorsed the Ljubljana Declaration on Gender Equality in Research and Innovation in 2021: Albania, Armenia, Austria, Belgium, Bulgaria, Bosnia and Herzegovina, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Iceland, Ireland, Italy, Kosovo, Lithuania, Luxembourg, Malta, Montenegro, the Netherlands, North Macedonia, Norway, Poland (Statement), Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland.

Not all Member States which endorsed the Ljubljana Declaration also expressed their commitment to ERA Action 5. In total 18 Member States committed themselves to ERA Action 5: Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Ireland, Italy, Lithuania, Netherlands, Poland, Portugal, Slovenia, Spain and Sweden.

This commitment has been expressed by a written statement from MS/AC towards the European Commission. There is no requirement to formulate a concrete roadmap or action plan as in the previous ERA period (2015-2020). Nevertheless, some countries formulated a national action plan (see for example Austria, Federal Ministry of Education, Science and Research, Federal Ministry of Climate Action, Environment, Energy, Mobility, Innovation and Technology 2022). These documents are not currently accessible via a common platform.



3. Available Information on Gender Equality in ERA

Although gender equality in ERA is based on a complex concept which does not only address women's representation in R&I in general and in top positions but also career prospects, working conditions and the integration of the gender dimension in R&I content and processes, most available indicators focus on women's representation. The She Figures (EC 2021c), the main source of EU wide comparable statistics on gender equality in R&I, contains indicators for each dimension. Available statistics describe a differentiated picture of the status quo regarding gender equality in R&I which is not easy to interpret (see also Wroblewski 2021). The difficulties in interpreting available statistics stem, on the one hand, from the fact that indicators are usually interpreted without considering other dimensions. On the other hand, available statistics do not focus on the implementation of policies but on output dimensions (like the share of women in Grade A or among leaders of HEIs).

3.1. She Figures

Usually, gender equality in R&I is reduced to the women's representation – especially in top positions such as Grade A or HEI management. For instance, the ERA progress reports for the period 2015-2020 focused on the share of women in Grade A positions as the headline indicator. The share of female PhD graduates was used as an input indicator. Most She Figures indicators focus on women's representation (see annex, Table 4). However, the picture based on these indicators is not a consistent one. Countries scoring high on one of these indicators, do not necessarily score high on other indicators.

Focusing on the indicator share of women in Grade A, Romania, Bosnia and Herzegovina, Latvia, Malta, Croatia, Lithuania and Bulgaria are top performers. In most of these countries, the share of women in research is also above average, but not in all of them. Romania, Bosnia and Herzegovina, Latvia, Bulgaria, Croatia and Lithuania score high in both indicators – share of women in research as well as the share of women in Grade A. On the other hand, in Malta the share of women in Grade A is above the EU average, but the share of women in research is below. In Estonia the share of women in research is above average but the share of women in Grade A below.

Considering the share of women as heads of higher education institutions, the situation is different. Countries with the highest share of women among leaders of higher education institutions are Latvia, Sweden, Iceland, Lithuania, Belgium, Denmark, Malta and Slovenia. The inconsistent pattern seems to be counterintuitive: One would expect a higher share of women among leaders of HEIs in countries with an almost gender balanced composition of professorships. The Glass Ceiling Index shows that this is not necessarily the case. The GCI measures the share of women in top positions (Grade A) compared to the share of women on the lower hierarchical levels and thus gives an indication of how difficult it is for women to reach top positions. The CGI is lowest in countries with a high share of women in Grade A – Malta, Bosnia Herzegovina, Romania or Bulgaria. But not all of these countries have an above average share of women among leaders of HEIs – e.g. Romania. On the contrary, most countries with a low share of women in Grade A also have an GCI above average – e.g. Cyprus, Luxembourg, Belgium, Germany or Hungary. Among these, Belgium has an above-average share of women among leaders of HEIs.



Hence, it is not easy to interpret in a coherent way indicators focusing on women's representation. However, the situation becomes even more complex if we integrate the other dimensions of gender equality in the picture. We do not know a lot regarding the dimension of structural change in R&I. The 2018 volume of She Figures (EC 2018: 108) contained the indicator "share of RPOs that adopted gender equality plans". This information was derived from a survey which had been conducted in the context of the MORRI project in 2016. Compared to other data in She Figures this information is less reliable due to survey non response. In 2016 countries with above average shares of RPOs that adopted gender equality plans were Sweden, Germany, UK, Belgium France, Finland, Spain, Austria and Ireland. These countries had a legal GEP requirement for RPOs already implemented in 2021 (ERAC SWG on Gender in Research and Innovation 2021).

The third dimension – integration of the gender dimension in research and innovation content – is represented in current She Figures by the percentage of a country's publications with a gender dimension in research and innovation content (based on bibliometric data from SCOPUS, covering a five-year period, 2014-2019). There is a lot of critique regarding the representativity of SCOPUS. For example, Tennant (2020) argues that SCOPUS as well as Web of Science are biased. "Both platforms are structurally biased against research produced in non-Western countries, non-English language research, and research from the arts, humanities, and social sciences." (Tennant 2020: 1) A bias based on the disciplines mentioned also contains an additional gender bias as women are overrepresented in these disciplines. The indicators based on Horizon 2020 projects are also difficult to interpret as the success rates of countries vary in Horizon 2020 (European Court of Auditors 2022).

It has also been criticised that She Figures lack an intersectional perspective regarding statistics on workforce but also regarding the gender dimension in research content. For the 2021 edition of She Figures an exploratory indicator has been developed to measure the integration of intersectional aspects in Horizon 2020 projects. This indicator analyses the text fields used for the indicator on gender dimension in R&I content in Horizon 2020 projects and combines the results retrieved from this indicator with search queries on intersectional aspects on research (EC 2021d). This means that the gender dimension in research content is represented by three indicators: the percentage of a country's publications with a gender dimension in research and innovation content, the percentage of Horizon 2020 projects in a country integrating a gender dimension or an intersectional approach (see annex, Table 5).

In summary, it can be said that the She Figures provide a wealth of information on the status quo and the development of gender equality in R&I, but that the interpretation of this information is not straightforward. There are several reasons for this: Firstly, the challenge in interpreting the information arises from the complexity of the construct of gender equality. Secondly, the different dimensions of gender equality cannot all be represented with the same valency. And thirdly, there is currently no theoretical or political debate on how the different dimensions should and can be weighted in relation to each other. This would be a prerequisite for the development of a gender equality index that brings together the different dimensions.

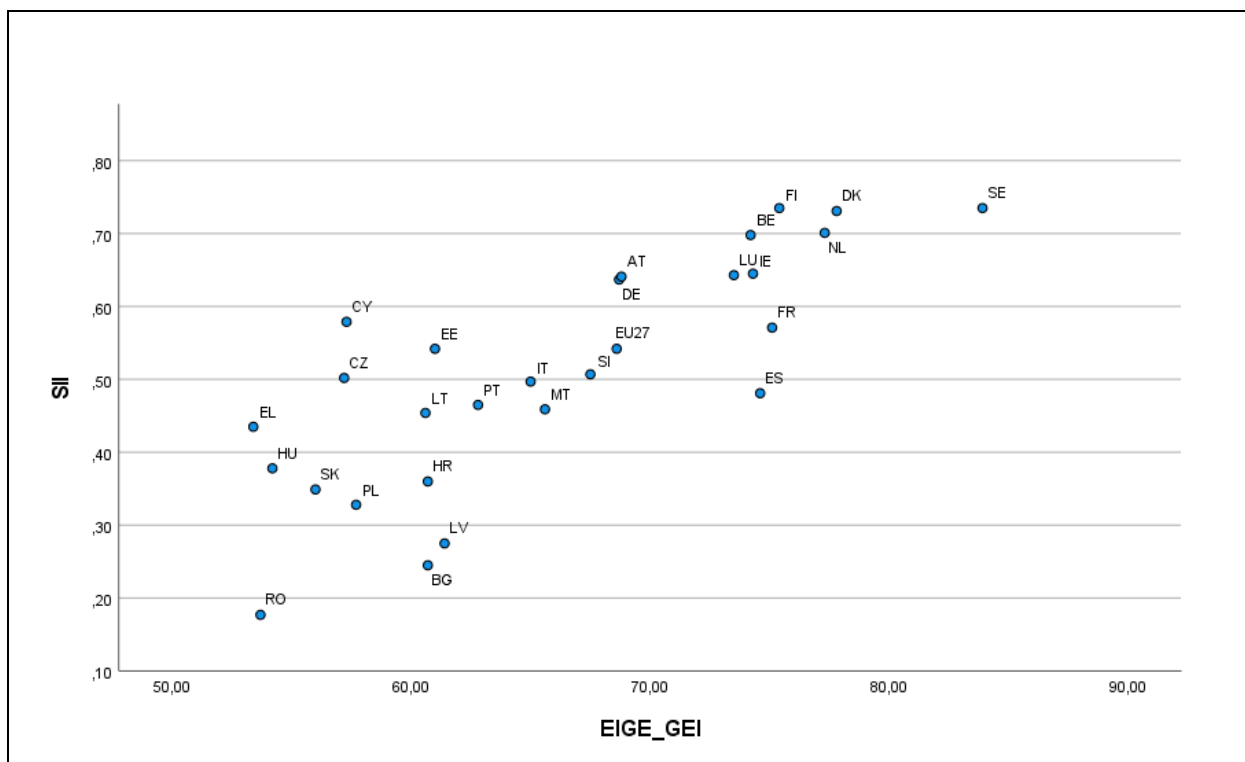
3.2. Gender Equality Index (EIGE)

GENDERACTION D3.3 (Wroblewski 2021) showed that indicators often used to measure gender equality are not always adequate and meaningful. Wroblewski shows that the share of women in Grade A, which was referred to as the headline indicator in the ERA progress reports (EC 2019a;



EC2019b), does not correlate with the EIGE gender equality index. The current data also does not show such a correlation. However, the EIGE gender equality index highly correlates with the national score in the innovation score board (Pearson 0.796). Figure 1 clearly shows that innovation leader countries (Sweden, Finland, Denmark, Netherlands, Belgium) all score high on the EIGE gender equality index, followed by some of the strong innovator countries (Ireland, Luxembourg). Given this strong relationship it is regrettable that the European Innovation Scoreboard does not include any indicators on gender. This is justified by a lack of data. “The EIS does not include any indicators on gender as such data are not available for most of the indicators used to measure structural differences.” (EC 2022: 12).

Figure 3: Correlation of EIGE GEI and SII



Source: EIGE GEI 2020 (EIGE 2022), SII 2022 (EC 2022)

D3.3 also showed a high correlation of the share of RPOs with gender equality plans and the innovation score. This analysis is not replicated due to a lack of current data for the share of PROs with GEPs.

3.3. Information regarding the implementation of gender equality policies

As already mentioned, there is only little information available on the implementation of gender equality policies (see above discussion regarding share of RPOs that implement GEPs). The GENDERACTIONplus benchmarking exercise provides data regarding the implementation of gender equality policies in countries participating in the survey. Even though this information is not



comprehensive (not covering all MS/AC) it remains an important data source due to a lack of EU wide available statistics.

We know from different sources (SWG GRI survey and GENDERACTIONplus benchmarking survey) that 11 countries formulated a national GEP requirement and that two countries have other mechanisms in place which support GEP implementation. The GENDERACTIONplus benchmarking survey also collected information regarding the sectors addressed by the requirement (public sector: higher education institutions, RPOs, administrative bodies; private sector: higher education institutions, RPOs, R&I companies). This information is available for seven countries only. In six countries not all sectors are addressed by the GEP requirement. Only in Sweden the requirement applies to all sectors. All but one country with a GEP requirement also has a related monitoring.



Table 1: GEP requirement at national level

GEP	Public sector			Private sector			National monitoring
	HEIs	RPOs	Admin.	HEIs	RPOs	R&I C.	
BE	Yes, BE-F; no BE-FWB						
BG	n.d.						
CZ	other						
DK	other						
DE	(yes)						
EE	(no)						
IE	yes	no	no	no	no	no	yes
EL	yes	yes	yes	no	no	no	yes
ES	yes	yes	yes	no	no	yes	yes
FR	(yes)						
HR	yes	yes	yes	yes	yes	no	yes
IT	(no)						
CY	(no)						
LV	n.d.						
LT	no						
LU	n.d.						
HU	(no)						
MT	(no)						
NL	(no)						
AT	yes	yes	no	yes	no	no	no
PL	no						
PT	no						
RO	n.d.						
SI	(no)						
SK	no						
FI	(yes)						
SE	yes	yes	yes	yes	yes	yes	yes
UK	n.d.						
IS	(yes)						
NO	yes	yes	yes	yes	no	yes	yes
CH	(yes)						
TR	(no)						
BA	(no)						
IL	no						

Note: Admin= administrative bodies; R&I C = R&I Companies, yes/no/other mechanism – Source: GENDERACTIONplus benchmarking survey (2022, D6.1., p.13); (yes)/(no) – Source: SWG GRI survey (2021)



Only five countries and the Belgium Wallonia-Brussels Federation have policies in place which aim at promoting the gender dimension in research content. In most countries such policies are implemented at RFO level.



Table 2: Countries with policies to strengthen the gender dimension in R&I content (national and RFO policies)

	national policies	RFO policies
BE	yes, BE-FWB; no, BE-F	yes, BE-FWB
BG	n.d.	yes
CZ	yes	yes
DK	no	no
DE	n.d.	n.d.
EE	n.d.	yes
IE	no	yes
EL	no	yes
ES	yes	yes
FR	n.d.	n.d.
HR	no	n.d.
IT	n.d.	yes
CY	n.d.	yes
LV	n.d.	n.d.
LT	no	yes
LU	n.d.	n.d.
HU	n.d.	n.d.
MT	n.d.	yes
NL	n.d.	n.d.
AT	yes	n.d.
PL	no	yes
PT	no	yes
RO	n.d.	yes
SI	n.d.	n.d.
SK	n.d.	n.d.
FI	n.d.	n.d.
SE	yes	yes
UK	n.d.	n.d.
IS	n.d.	n.d.
NO	yes	yes
CH	n.d.	n.d.
TR	n.d.	yes
BA	n.d.	n.d.
IL	no	n.d.

Source: GENDERACTIONplus benchmarking survey (2022, D4.1), own elaboration.

The situation is even more fragmented regarding policies focusing on gender-based violence: Only three countries already have national or regional policies targeting RFOs in place. Several countries



are planning to implement policies which address RPOs through actions of RFOs. Nine countries have policies in place which directly address RPOs and require actions at institutional level.

Table 3: Countries with policies focusing on gender-based violence

	national/regional policies targeting RFOs	nat./reg. policies targeting RPOs with actions for RFOs	national/regional policies for RPOs with actions
BE	yes, BE-F; no BE-FWB	yes, BE-F; no BE-FWB	yes, BE-FWB; don't know, BE-F
BG	n.d.	n.d.	n.d.
CZ	no	no	no
DK	no	no	no
DE	n.d.	n.d.	n.d.
EE	n.d.	n.d.	n.d.
IE	don't know	planned	yes
EL	yes	yes	yes
ES	no	no	yes
FR	n.d.	n.d.	n.d.
HR	no	planned	don't know
IT	n.d.	n.d.	n.d.
CY	n.d.	n.d.	n.d.
LV	n.d.	n.d.	n.d.
LT	yes	planned	yes
LU	n.d.	n.d.	n.d.
HU	n.d.	n.d.	n.d.
MT	n.d.	n.d.	n.d.
NL	n.d.	n.d.	n.d.
AT	planned	planned	yes
PL	yes	planned	yes
PT	don't know	yes	yes
RO	n.d.	n.d.	n.d.
SI	n.d.	n.d.	n.d.
SK	n.d.	n.d.	n.d.
FI	n.d.	n.d.	n.d.
SE	no	no	no
UK	n.d.	n.d.	n.d.
IS	n.d.	n.d.	n.d.
NO	don't know	no	yes
CH	n.d.	n.d.	n.d.
TR	n.d.	n.d.	n.d.
BA	n.d.	n.d.	n.d.
IL	no	no	yes

Source: GENDERACTIONplus benchmarking survey (2022, D3.1, page 34).



These examples illustrate how fragmented the information regarding policy implementation is within Europe. This lack of comparable data not only complicates a comparative analysis between countries, it also makes it impossible to draw conclusions about the effectiveness of measures and thus reduces the possibility of mutual learning. A lack of empirical evidence that indicates what works, makes it difficult to identify good practices.

That's why GENDERACTIONplus aims at providing information on the implementation of policies in the framework of ERA Action 5. A monitoring of ERA Action 5 implementation at national level would, on the one hand, provide MS/AC with a tool supporting reflection on national level on progress, success and failure of policies. On the other hand, a comparative view on national monitoring would provide a basis for the European Commission to assess its approach to gender equality policy in ERA and to develop it further.



4. Monitoring Framework

The Pact for R&I (Council for the European Union 2021a) recommends the establishment of an enhanced ERA Monitoring Mechanism, to ensure a proper basis for evidence-informed policy making in the ERA and to support and facilitate the implementation of the ERA Policy Agenda at both European and national levels. According to the Pact, the ERA Monitoring Mechanism should encompass the following elements:

- an ERA Scoreboard, which monitors progress towards the ERA objectives at Union level. The ERA Scoreboard should be updated regularly and should assess the overall consolidation and collective progress of ERA priorities. It should only display aggregated data at Union level.
- a more detailed ERA Dashboard monitoring progress towards the ERA objectives at national level, through a rich combination of relevant input, outcome and impact indicators and qualitative analyses that accommodate the different circumstances of Member States and that relate to the ERA priorities.
- regular policy dialogues between the Member States and the Commission – both bilaterally and multilaterally – to actively assess and guide the implementation of the ERA policy agenda, in particular through the sharing of best practices and mutual learning exercises. The Commission will provide further support through the Horizon Policy Support Facility and the Technical Support Instrument.
- an ERA policy online platform, where the Member States and the Commission should share information on their current and planned policies and programmes that contribute to implementing the ERA Policy Agenda.
- a review of the implementation of the ERA policy agenda by the Commission taking place every 18 months, including a report for consideration by the Council on the state of play of its implementation in view of steering the ongoing ERA Policy Agenda
- an annual report provided by the Commission to each Member State on its progress, in support of the regular policy dialogues between Member States and the Commission.

In the following, the GENDERACTIONplus approach to monitoring is described. Based on that, a proposal for a monitoring of ERA Action 5 implementation at national level is formulated. This proposal refers to the objectives and requirements formulated in the strategic ERA documents (EC 2020; EC 2021a, 2021b; Council of the European Union 2021a).

4.1. Aim and purpose of a monitoring

For the purposes of this report, we define monitoring in line with the definition proposed by Markiewicz and Patrick (2016: 12) as: “the planned, continuous and systematic collection and analysis of program information able to provide management and key stakeholders with an indication of the extent of progress in implementation, and in relation to program performance against stated objectives and expectations.”⁹

⁹ This does not include a systematic determination of the quality and value of the policies or measures implemented or their contribution to the achievement of goals and objectives, which would be the task of an evaluation.



Continuous monitoring generally pursues four goals which together support the efficient use of resources (see also Wroblewski 2021):

- Monitoring should provide an overview of current developments in the context of the policy of interest. In the context of gender equality in ERA, relevant indicators refer to the number of higher education institutions (HEIs) and the development in the total number of professors and researchers. This information is necessary to interpret the monitoring indicators.
- The core function of the monitoring is to provide information about policy implementation (e.g. number of policies implemented, number of participants in training programmes and share of women, number of beneficiaries of subsidies and share of women, budget spent on specific measures). This information makes accountability of stakeholders transparent and provides first indications of suboptimal implementation.
- In an ideal case, the indicators used in a monitoring system also provide the basis for policy steering. This would require that targets for specific policies are formulated in a way that corresponds to the indicator(s) (e.g. when the performance agreement between a government ministry and a university contains the target to increase the share of women in professorships, and the monitoring includes a corresponding indicator).
- The information provided by the monitoring helps to identify deviations from planned implementation and consequently the need to adapt policies or their implementation at an early stage.

Efficient monitoring should be based on the following principles (see also Wroblewski et al. 2017).

- In general, monitoring systems are **based on empirical data** which is available on a regular basis and easily accessible. In most cases, monitoring indicators consist of quantitative indicators which are derived from the main objectives in a policy field. However, objectives cannot always be formulated in a quantifiable manner. In such cases, qualitative indicators should be included.
- A monitoring system should include **indicators which describe the context** of the policy or measure, the **expected output or outcome** of a policy as well as its **implementation**. Examples of context indicators in the field of national gender equality policy in R&I are the numbers of male and female researchers or the number of research institutions. An example of an indicator which describes the expected output is the share of women among newly-appointed professors. Potential outcome indicators are the share of female professors or the share of women in decision-making bodies.
- Indicators focusing on the implementation of policies should represent the number of participants in programmes, the budget spent on programme implementation or the number of complaints addressed to an equality officer. Indicators focusing on the implementation of policies should be derived from a logic model or a programme theory explicitly formulated for the concrete policy.¹⁰
- Monitoring indicators should be developed with the participation of the main stakeholders. The aim is to establish an **agreed set of indicators** which all relevant stakeholders accept as

¹⁰ A logic model should indicate the goal of a policy (intended impact), then the changes (outcomes) that need to be made to achieve that goal, then all the things that need to be delivered (outputs) to bring about those changes and the activities that need to be carried out in order to ensure that the planned outputs are delivered. For further information, see W.K. Kellogg Foundation (2004).



meaningful and relevant. This agreed set of indicators should likewise be based on a data source which all stakeholders define as reliable.

- The agreed set of **indicators** should be **available at regular intervals** (e.g. yearly or monthly). The timing should be linked to the planned intervals for presentation and discussion of monitoring results (e.g. in the form of annual or monthly reports).
- Monitoring results should be **presented and interpreted on a regular basis**. This presentation will both contribute to a gender equality discourse in the concrete policy field and provide the basis for policy learning. Monitoring results allow the overall political strategy and the concrete policy design to be reviewed. They also facilitate the assessment of progress towards the planned outcome. If deviations from the expected outcome are identified, an analysis of the underlying mechanisms and causes should be carried out. Lessons learned (success stories as well as failures) should also be identified.
- Finally, a monitoring system should be seen as a **“living tool”** which has to be adapted when policies are changed.

4.2. Monitoring as part of a complete policy cycle and embedded in a policy discourse

D3.3 of GENDERACTION (Wroblewski 2021) stressed the relevance of a common understanding of gender equality challenges and objectives as well as a common understanding of progress towards gender equality as central elements of a policy discourse which should be developed at the European and the national level. We understand discourse to be “thematically connected and problem-related semiotic (for example oral or written) occurrences that relate to specific semiotic types, which serve particular political functions” (Reisigl 2008: 99; see also Wodak 2008). Hence, we start from the position that problems are not given but rather social constructs (see Bacchi 2009). This means that “gender equality”, “gender-based violence” or “intersectionality” are discursively constructed forms of social knowledge. ERA Action 5 policies are part of this productive process, for example with regard to the way the problem of gender inequality is presented and which solutions are proposed (Bacchi 2000). This is why, in our analysis of the implementation of NAPs, we focus on how the gender equality problem was

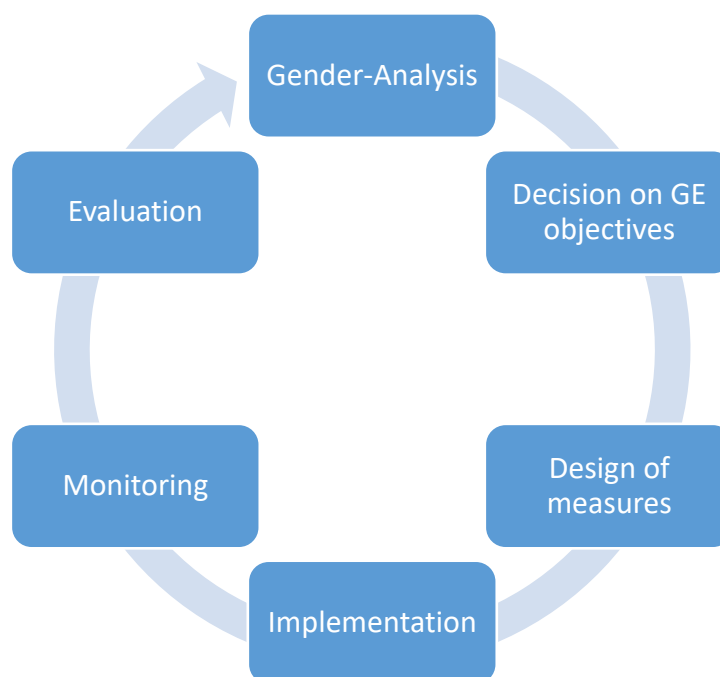
A national discourse on gender equality in R&I aims at securing a common understanding of the status quo of gender equality (where do we stand?), of challenges to be addressed (what are our priorities?) and objectives to be reached (what do we want to achieve?). This requires the involvement of a broad range of stakeholders. If we take the perspective of a national authority, it is important to have a common understanding within the organisation to avoid a situation that other policies pursued by the ministry contradict gender equality objectives or to secure that synergies are used. Furthermore, it is important to have a shared understanding with those designing and implementing concrete measures and those who are addressed by these measures.



represented in policy making (both in documents and policies).

Furthermore, GENDERACTIONplus is based on the assumption that the effective implementation of policies follows a complete policy cycle. Ideally, gender equality policies are based on a baseline assessment of the status quo regarding gender equality. What are the main challenges to be addressed? Which mechanisms produce inequalities? How could these inequalities be tackled? Based on the results of the gender analysis, gender equality objectives are formulated. These objectives are the starting point for the development of concrete measures. These measures are implemented, monitored and in an ideal world evaluated.

Figure 4: Complete cycle for the development and implementation of gender equality policies

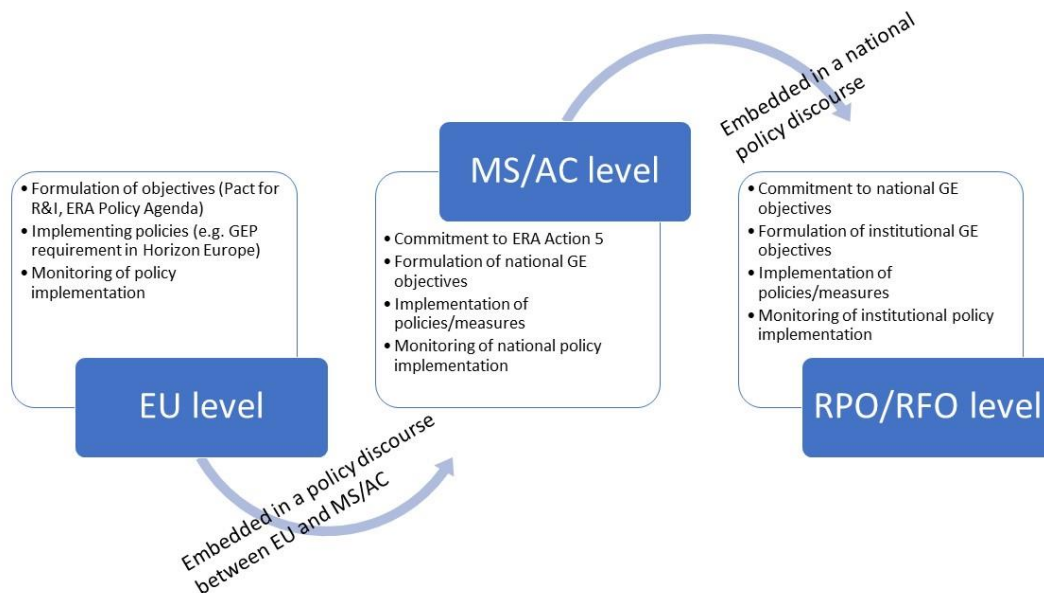


Source: own elaboration based on May, Wildavsky 1978

This ideal model can be formulated for the European as well as the national or institutional level. Ideally, the levels influence and strengthen each other. This means that the objectives formulated or measures taken at the European level are adopted at the national level or, if necessary, adapted to the national circumstances. Similarly, the national gender equality objectives are adopted at the institutional level or priorities for gender equality are set according to the respective framework conditions. In this ideal world described, neither the national goals contradict those at EU level nor the institutional goals contradict those at national level. Any reservations or resistance are raised and discussed in a corresponding policy discourse.



Figure 5: Interplay between EU, national and institutional gender equality objectives and policies



Source: own elaboration.

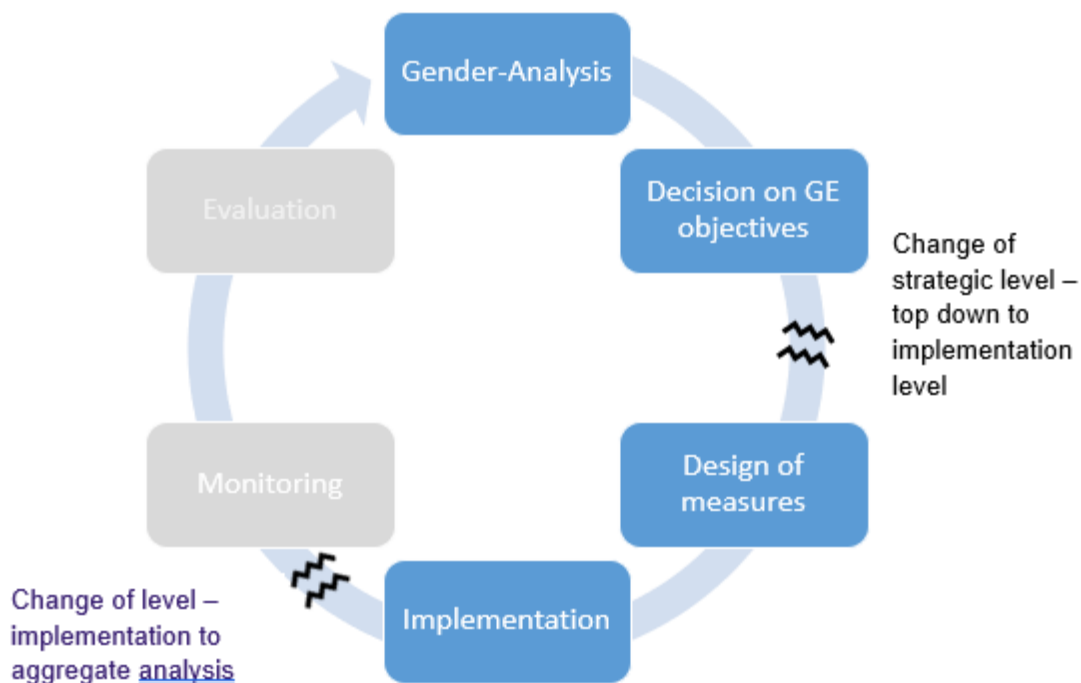
In this ideal model the understanding of the problem and the objectives are agreed on and do not change on the following level. However, what reality shows us differs in most cases from this ideal model. And this is very similar on the national level as well as the institutional level.

In an ideal case, a national or institutional policy is based on a gender analysis which provides an assessment of the status quo regarding gender equality. Results of the gender analysis serve as the basis for the definition of gender equality objectives. This decision is in most cases a top-down decision – in some cases based on a participatory approach (by involving stakeholders). What we then see is a phenomenon of down sourcing the responsibility for reaching these goals. Within the organisation, units or departments become responsible for the development and implementation of gender equality measures within the framework of the defined objectives. At national level the development and implementation of concrete measures is sometimes outsourced – experts or stakeholders are commissioned with this task. Hence, we see in the implementation of a complete policy cycle a change of the strategic level. With this change of strategic level, we cannot assume that the perception of the problem and the interpretation of the problem remain stable. Especially when objectives are defined in a broad and vague way – more as a general commitment than a concrete objective – a broad range of interpretations become possible.

What we also see in several cases is a missing link of the level of policy implementation back to the top-down level. Especially, when monitoring and evaluation are not standard tools of policy making, there is a missing discussion of experiences made with the implementation of measures and the results achieved. A national discourse should also focus on the discussion of what worked, why or why not and what are lessons learned for future policies.



Figure 6: *Incomplete policy cycle*



Source: own elaboration.

4.3. Level of monitoring

A monitoring of policy implementation and the related discourse can focus on the European, the national or the institutional level. At each level, effective policy implementation requires a participatory approach – regarding the development and implementation of policies as well as regarding monitoring. In an ideal case, the different levels are interlinked and refer to each other. E.g., the use of synergies or potential leverage effects between the European and national level is possible when national gender equality policies refer to European objectives and policies. Synergies may result from the fact that European policies as well as national policies address research performing organisations (RPOs). If RPOs are exposed to divergent requirements, uncertainties, parallel and unrelated initiatives or – in a worst case – frustrations may occur. A concrete example is the GEP requirement formulated by Horizon Europe (European level), which is not necessarily linked to national policies. As a consequence, institutions may be confronted with divergent standards at European and national level, how GEPs should look like and which criteria they should meet.

In an ideal setting, gender equality policies at different levels pursue the same objectives and related monitoring are based on comparable indicators. The congruence of objectives and approaches at European and national level is also the result of a common gender equality policy discourse.

The monitoring outlined in the following focuses on the national level. The main question is how to represent progress in policy implementation in a monitoring. This is not a synonym to the monitoring of



the development of gender equality indicators (e.g. share of women in Grade A positions or in HEI top management).

4.4. Proposed set of indicators to monitor ERA Action 5 implementation

To assess the implementation of ERA Action 5 a set of qualitative indicators is proposed which will complement the analysis of gender equality based on quantitative indicators such as She Figures (see section 3).

Qualitative indicators are proposed for the following dimensions:

Commitment to gender equality and inclusiveness

- Endorsement of the Ljubljana Declaration (yes/no)
- Commitment to ERA Action 5 (yes/no)
- Formulation of a national action plan (ERA NAP) (yes/no)
- Formulation of a national policy on gender equality focusing on R&I and/or HEIs which refers to ERA

Gender Equality Objectives

- Are objectives formulated focusing on fair, open, inclusive and gender equal career paths? (yes/no, if yes: which concrete objectives are formulated)
- Are objectives formulated focusing on systemic institutional and structural change? (yes/no, if yes: which concrete objectives are formulated)
- Are objectives formulated to ensure gender balance and increase diversity in decision-making? (yes/no, if yes: which concrete objectives are formulated)
- Are objectives formulated to foster the integration of sex, gender and intersectional analysis into research and innovation content? (yes/no, if yes: which concrete objectives are formulated)
- Are objectives formulated focusing on counteracting gender-based violence including sexual harassment? (yes/no, if yes: which concrete objectives are formulated)
- Are objectives formulated focusing on removing inequalities regardless of gender, racial or ethnic origin, religion or belief, disability, age or sexual orientation? (yes/no, if yes: which concrete objectives are formulated)

Gender equality measures planned and implemented

- Are measures planned/implemented to promote fair, open, inclusive and gender equal career paths? (yes planned/yes implemented/no, if yes: description of measure(s)).
- Are measures planned/implemented to promote systemic institutional and structural change? (yes planned/yes implemented/no, if yes: description of measure(s)).
- Are measures planned/implemented to promote gender balance and increase diversity in decision-making? (yes planned/yes implemented/no, if yes: description of measure(s)).
- Are measures planned/implemented to promote the integration of sex, gender and intersectional analysis into research and innovation content? (yes planned/yes implemented/no, if yes: description of measure(s)).
- Are measures planned/implemented to counteract gender-based violence including sexual harassment? (yes planned/yes implemented/no, if yes: description of measure(s)).



- Are measures planned/implemented to remove inequalities regardless of gender, racial or ethnic origin, religion or belief, disability, age or sexual orientation? (yes planned/yes implemented/no, if yes: description of measure(s)).

Monitoring of policy implementation

- Does a monitoring for gender equality exist which provides information on relevant gender equality dimensions like women's representation in all fields and hierarchical levels, women's participation in decision-making, gender dimension and intersectional approaches in research and innovation content, prevalence of gender-based violence including sexual harassment? If yes, which concrete indicators are covered by the monitoring and is the monitoring publicly accessible?
- Does a monitoring exist which focuses on the implementation of national measures (e.g. number of participants in trainings or programmes funded by national authorities, budget spent)? (yes/no, if yes: description of information provided)
- Does a monitoring exist which focuses on the implementation of national or European policies by RPOs and RFOs (e.g. number of institutions with a GEP)? (yes/no, if yes: description of information provided)

For countries participating in the GENDERACTIONplus benchmarking survey some of the information relevant for a monitoring of ERA Action 5 implementation described above is available. For a monitoring covering all MS/AC committed to ERA Action 5 it is necessary to complement the information available. The relevant information can be obtained from policy documents such as national ERA NAPs or national strategies focusing on gender equality in R&I and/or HEIs and through a survey among MS/AC representatives in the ERA Forum subgroup on inclusive gender equality.

To complement the monitoring of ERA Action 5 implementation at national level, it would be interesting to know if and how the gender dimension is considered in the implementation of other ERA Actions (e.g. ERA Action 4 "Promote active research careers"). GENDERACTIONplus proposes to include a question in the survey among ERA Forum subgroup members if/how the gender dimension is considered in ERA Action 4 implementation (if there is a commitment to ERA Action 4). In addition to that it is proposed to conduct qualitative interviews with ERA Forum subgroup members on the concrete linkages between Action 4 and Action 5, facilitating and hindering factors for the consideration of gender equality in Action 4 and the gender concept Action 4 refers to.



5. Summary and conclusions

Gender equality has been one of ERA's priorities for more than a decade. In 2021 most Member States and Associated Countries renewed and reinforced their commitment to gender equality by endorsing the **Ljubljana Declaration**. With the Ljubljana Declaration, the main stakeholder in R&I (EC, MS/AC) agreed on the directions of further development: to address gender-based violence, to move from a gender oriented to an intersectional approach to gender equality and to focus on GEPs as the most significant instrument to achieve sustainable progress towards gender equality in R&I. The Ljubljana Declaration referred to the **Pact for Research and Innovation** in Europe which has been adopted by the Council of the European Union in 2021. The Council also established the ERA Policy Agenda which sets out the ERA actions to be implemented. ERA Action 5 focuses on gender equality and inclusiveness. Not all Member States which endorsed the Ljubljana Declaration also expressed a commitment to ERA Action 5. In total 18 Member States and two Associated countries committed themselves to ERA Action 5: Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Ireland, Israel (AC), Italy, Lithuania, Netherlands, Norway (AC), Poland, Portugal, Slovenia, Spain and Sweden.

This commitment to ERA Action 5 has been expressed by a written statement from MS/AC. Compared to the previous ERA period (2015-2020), there is now a more detailed description provided by the European Commission of what is expected from Member States which are committed to pursue gender equality and inclusiveness. However, as there is no requirement to formulate a national action plan as in the previous ERA period, there is only limited information available regarding MS/AC priorities, objectives and planned or implemented measures.

Furthermore, the initial situation differs in individual countries depending on their experience with gender equality policies and the status quo regarding gender equality in the different dimensions addressed by the ERA gender equality objectives (women's representation in all fields a hierarchical levels, in decision-making, structural change, fostering the gender dimension in R&I content, counteracting gender-based violence including sexual harassment, intersectional approach). The assessment of the status quo regarding gender equality is not only difficult due to the complex gender equality construct defined at the European level but also because individual dimensions are interlinked and cannot be weighed against each other (e.g. that positive performance regarding women's representation compensates for missing consideration of the gender dimension in R&I content). The dimensions do not necessarily strengthen each other either. For instance, a high share of women in Grade A positions does not inevitably foster the gender dimension in R&I content. Another complicating factor is that comparable data is not available for all gender equality dimensions addressed by ERA Action 5. For the dimension of women's representation, several indicators are available which allow for a comparative analysis. The situation is different for the gender dimension in R&I content where only a few indicators with a lower degree of validity are available. The situation becomes even worse regarding structural change or the prevalence of gender-based violence. Such indicators are currently not included in national statistics and when they are available, it is for selected



countries in the framework of specific projects - such as the UniSAFE project¹¹ or GENDERACTIONplus (see the benchmarking reports of WP3 or WP6).

The situation resulting from the comprehensive gender equality goal and the lack of comparable data is highly complex and calls for an accompanying monitoring and continued of a common gender equality discourse. On the one hand, it is important to know more about the gender equality objectives and policies formulated at national level as well as how concepts are used (e.g. gender, intersectionality).¹² On the other hand, it is necessary to have more detailed information about policies implemented at national level as well as related outcomes. A policy discourse based on this information may support the development of a common understanding of gender equality concepts and objectives. Currently, policy makers at European and national level assume that there is a coherent and consistent understanding of the concepts used in European documents. However, the GENDERACTIONplus benchmarking reports show that concepts are interpreted differently and policies or measures referring to the same concepts are comparable only to a limited extend. Furthermore, a monitoring of policy implementation allows to identify good practices at national level which supports exchange of experiences and mutual learning. development

GENDERACTIONplus proposes qualitative indicators for a monitoring of ERA Action 5 implementation focusing on the following dimensions:

- Commitment to gender equality and inclusiveness
- Formulation of gender equality objectives
- Gender equality measures planned and implemented
- Availability of a monitoring of policy implementation

The next step is to collect information regarding ERA Action 5 implementation at national level. It is suggested to implement a survey among members of ERA Forum subgroup on gender equality and inclusiveness.

¹¹ <https://unisafe-gbv.eu/national-reports/>

¹² The GENDERACTIONplus benchmarking reports provide initial information on how in the benchmarking survey participating countries refer to specific concepts. To include additional countries in a related policy discourse it would be necessary to collect this information also for other MS/AC.



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ANNEX

Table 4: She Figures indicators focusing on women's representation (2021)

	Grade A	Heads of HEIs	% women doctoral graduates	% women researchers
EU27	26,18	23,60	48,10	32,80
BE	20,29	37,00	43,90	34,80
BG	39,70	25,50	53,10	47,40
CZ	n.d.	17,20	43,70	26,60
DK	22,55	33,30	49,00	35,80
DE	20,47	23,20	45,20	27,90
EE	n.d.	20,00	48,40	42,20
IE	25,63	18,20	51,00	36,30
EL	22,29	16,00	47,40	37,80
ES	23,90	18,00	52,60	40,50
FR	27,65	12,10	43,90	28,30
HR	43,02	26,50	53,90	48,40
IT	23,74	25,40	50,50	34,30
CY	13,30	9,10	49,20	38,10
LV	44,65	44,20	54,50	52,20
LT	40,40	39,00	57,90	49,50
LU	17,67	0,00	35,60	28,10
HU	21,64	17,20	46,20	30,50
MT	43,75	29,30	50,90	30,90
NL	22,25	22,70	48,10	26,40
AT	25,09	26,80	44,00	30,10
PL	25,22	19,60	56,30	38,10
PT	27,15	27,20	52,90	43,30
RO	50,78	11,10	53,20	46,70
SI	32,95	32,70	54,00	32,30
SK	27,23	22,90	49,20	41,20
FI	30,32	20,50	52,00	33,20
SE	28,22	41,70	47,90	32,60
UK	26,41	24,20	46,60	38,80
IS	26,32	40,00	59,00	46,40
NO	30,91	25,80	50,40	38,10
CH	24,08	24,40	44,80	34,90
TR	30,46	28,00	46,90	37,00
BA	46,56	25,50	46,70	44,30
IL	19,45	21,60	53,10	n.d.

Note: Grade A = Proportion (%) of women among academic staff Grade A, 2018 (p. 184); Heads of HEIs = Proportion (%) of women among heads of institutions in the Higher Education Sector, 2019 (p. 200); % women doctoral graduates = Proportion (%) of women among doctoral graduates, 2018 (p. 27); % women researchers = Proportion (%) of women among researchers, 2018 (p. 97)
Source: EC (2021c)



Table 5: She Figures indicators focusing career prospects (GCI) and gender dimension in R&I content (2021)

	GCI 2018	GDRIC 2015-2019	%H2020 GD	% H2020 IA
EU27	1,58	1,80	1,65	0,19
BE	1,73	1,76	1,25	0,10
BG	1,21	1,79	1,92	0,21
CZ	n.d.	1,76	1,40	0,00
DK	1,66	2,42	1,15	0,17
DE	1,33	1,46	1,19	0,09
EE	n.d.	2,44	2,06	0,00
IE	2,16	1,90	2,11	0,29
EL	1,41	2,05	1,26	0,04
ES	1,90	2,17	1,42	0,11
FR	1,47	1,30	1,32	0,08
HR	1,23	3,03	0,70	0,00
IT	1,71	1,48	1,47	0,17
CY	2,60	2,46	1,64	0,00
LV	1,42	1,18	0,31	0,00
LT	1,42	2,45	1,52	0,00
LU	1,68	1,60	0,78	0,00
HU	1,94	1,89	1,56	0,00
MT	0,87	2,96	2,96	0,00
NL	1,71	2,09	1,46	0,16
AT	1,55	1,87	1,58	0,16
PL	1,78	2,03	1,81	0,07
PT	1,71	1,93	1,93	0,21
RO	1,03	1,17	1,24	0,00
SI	1,39	1,73	2,68	0,26
SK	1,74	1,95	1,95	0,00
FI	1,56	2,73	1,52	0,17
SE	1,59	3,20	1,83	0,22
UK	1,64	1,94	1,74	0,22
IS	1,41	4,01	1,94	0,00
NO	1,50	2,96	1,57	0,06
CH	1,57	1,80	1,27	0,03
TR	1,24	3,71	2,20	0,47
BA	1,00	4,30	5,36	0,00
IL	2,33	2,17	1,56	0,21

Note: GCI= Glass Ceiling Index, 2015-2018 (p. 194); GDRIC = Percentage of a country's publications with a gender dimension in their research and innovation content, 2015-2019 (p. 264); %H2020 GD = Proportion (%) of Horizon 2020 projects integrating a gender dimension (p. 269); %H2020 IA = Proportion (%) of Horizon 2020 projects integrating an intersectionality approach (p. 270)
Source: EC (2021c)



Table 6: Share of RPOs with GEPs

	GEPs
EU28	55,9
BE	83,3
BG	14,3
CZ	14,3
DK	50,0
DE	92,9
EE	0,0
IE	60,0
EL	50,0
ES	75,0
FR	81,8
HR	20,0
IT	38,9
CY	50,0
LV	0,0
LT	0,0
LU	n.d.
HU	38,5
MT	0,0
NL	43,5
AT	74,3
PL	22,2
PT	25,0
RO	20,0
SI	22,2
SK	12,5
FI	78,9
SE	95,2
UK	91,3

Source: EC (2019d: 108)



Table 7: Gender Equality Index (2022)

	EIGE GEI
EU27	68,6
BE	74,2
BG	60,7
CZ	57,2
DK	77,8
DE	68,7
EE	61,0
IE	74,3
EL	53,4
ES	74,6
FR	75,1
HR	60,7
IT	65,0
CY	57,3
LV	61,4
LT	60,6
LU	73,5
HU	54,2
MT	65,6
NL	77,3
AT	68,8
PL	57,7
PT	62,8
RO	53,7
SI	67,5
SK	56,0
FI	75,4
SE	83,9

Source: EIGE (2022)



Table 8: Summary Innovation Index (SII)

	SII
EU27	0,542
BE	0,698
BG	0,245
CZ	0,502
DK	0,731
DE	0,637
EE	0,542
IE	0,645
EL	0,435
ES	0,481
FR	0,571
HR	0,360
IT	0,497
CY	0,579
LV	0,275
LT	0,454
LU	0,643
HU	0,378
MT	0,459
NL	0,701
AT	0,641
PL	0,328
PT	0,465
RO	0,177
SI	0,507
SK	0,349
FI	0,735
SE	0,735
UK	0,639
IS	0,565
NO	0,663
CH	0,772
TR	0,259
BA	0,189
IL	0,523

Source: EC (2022: 121)

