

The Challenge of Studying the Institutionalization of Gender Equality in European Research Performing Organizations

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The engagement in the European Research Area (ERA) for gender equality (European Commission 2021a) and the competition for excellence (Riegraf/Weber 2017) have become interrelated in research funding programs with a gender equality plan (GEP) eligibility criterion. For example, since 2022, to be eligible for funding under Horizon Europe, research performing organizations (RPOs) must have a GEP in place (European Commission 2021b, 9). There is some evidence that this strategy of combining epistemic and organizational logic (Vilhena/López Belloso/Silvestre Cabrera 2025; Wroblewski/Palmén 2022) has led to an increase in the prevalence of GEPs across European RPOs (Karataş/Löther/Weber 2025) and seems to be successful in initiating institutional change toward gender equality.

However, investigating whether and how GEPs initiate institutional change toward gender equality remains challenging and requires a research approach that analyzes individual cases in depth. By contrast, this article takes an explorative approach, using self-reported data by RPOs in a survey and publicly available web-scraped documents to investigate how institutional change toward gender equality is perceived in relation to GEPs. Further, our objective is to examine institutional change in multiple RPOs throughout Europe, rather than focusing on just one. We seek to explore the institutionalization of gender equality in RPOs and its relationship to the presence of GEPs.

For our theoretical framework, we combine organizational neo-institutionalism perspectives with feminist institutional approaches and the methodological framework of the “theory of change.” Neo-institutionalism perspectives explain how institutionalization occurs within organizations. Feminist institutional approaches highlight that institutionalization is a gendered power process, as femininity and engagement for gender equality are often still devalued in academia. The “theory of change” approach provides insights into the factors that enable institutional change in relation to GEPs. By institutional change toward – or the institutionalization of – gender equality, we mean the process by which an organization initiates measures based on a GEP, allocates resources, considers how these measures can be linked to and monitored against gender equality objectives, and perceives changes in relation to this. Gender equality is a highly ambitious goal that is challenging to define due to its multidimensional nature. Our article does not examine whether this goal has been achieved; rather, it considers the extent to which RPOs pursue and utilise it to inform organizational actions.

After presenting our theoretical perspectives, we describe our methodological approach and data sources. We then present our empirical findings in three subsections: First, we present data on the degree of institutionalization of gender equality

activities at RPOs. Second, we show how the factors that support the institutionalization of gender equality are distributed among our sample. Third, we demonstrate how organizations perceive changes toward gender equality. The paper concludes with a summary of our findings, highlighting their implications for policymakers, researchers, and politicians.

Theoretical Perspectives on the Institutionalization of Gender Equality in Academia

Organizational neo-institutionalism perspectives emphasize that organizations require societal legitimacy to obtain necessary external resources such as funding, staff, and reputation. To gain this legitimacy, they must incorporate “rationalized institutional rules” that “function as powerful myths” (Meyer/Rowan 1977, 340), for example, gender equality, sustainability, and efficiency. Institutions such as gender equality are opaque and inert. They must be (re)produced through actions. This is also how organizations can change via institutional work (Brunsson 1993; Lawrence/Suddaby/Leca 2009). Institutional work is the process through which “institutions are created, maintained, and disrupted” (Lawrence/Suddaby/Leca 2009, 1). Individuals in organizations must execute decisions and establish routines in alignment with specific goals. Although routines and procedures may become de-institutionalized, this is rather unlikely, as institutions tend to be inert. The existence of a GEP, for example, indicates some degree of institutionalization of gender equality policy. Further, dedicated resources and staff for gender equality work indicate a process toward greater institutionalization of gender equality. A GEP initiates a formal process that cannot be quickly and fully reversed and that might be incorporated into other documents and formal procedures within the organization.

Feminist scholars have demonstrated that the institutionalization of gender equality is shaped by underlying gendered power structures. As Chappell (2006, 226) argues, “institutional norms prescribe (as well as proscribe) ‘acceptable’ masculine and feminine forms of behavior, rules and values for men and women within institutions.” This also has consequences for GEPs, including whether they are valued, pursued, or resisted and how many resources are dedicated to their implementation (Linková/Mergaert 2021; Mackay 2014; O’Connor/White 2021; Schredl/Lipinsky 2025).

The methodological framework “theory of change” has focused on how GEPs initiate change within organizations and what factors (“impact drivers”) support this process (Bührer et al. 2020; Kalpazidou Schmidt et al. 2017; Mergaert/Cacace/Linková 2022; Wroblewski/Palmén 2022). We draw on this line of research to derive our units of analysis for the institutionalization of gender equality in relation to having a GEP in an organization (Figure 1). Based on these studies, a GEP determines which measures to take and how to implement them.

Horizon Europe recommends five thematic (i.e., content-related) areas for gender equality measures, to which we also refer in this study (European Commission