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The Complexity of Defining Institutional Change in Academia

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Abstract

In recent decades, the European research and innovation landscape has shifted from addressing gender inequality by focusing on "fixing women" to prioritising "fixing the institution," with gender equality plans (GEPs) as the primary tool for transformation. While policies have spurred initiatives across EU member states and associated countries, progress remains uneven. Existing studies often attribute the gap between policy intentions and outcomes to GEP implementation issues. This article argues, however, that the complexity of framing institutional change strategies during GEP planning and design contributes equally to this policy–practice gap. Drawing on feminist institutionalism and complexity theories, this article examines how different stakeholders receive, interpret, and reshape policy ideas surrounding institutional change. It interrogates whether there is a shared definition of institutional change among those responsible for planning and implementing GEPs and discusses the (in)consistencies in the assessment of concrete initiatives as institutional change. Empirical data derive from a case study of six European institutions implementing GEPs under the Horizon 2020 project GEARING-Roles, complemented by interviews with representatives from other 7th Framework Programme and Horizon 2020 GEP-implementing projects. The findings reveal significant ambiguity in how institutional change is interpreted and translated into actions, with this ambiguity manifesting both among GEP implementers and the European Commission. We conclude that clearer guidelines and more consistent assessments are necessary, alongside theory-based and practice-oriented definitions of institutional change, which we propose as an attempt to address this gap.

Keywords

academic organisations; complexity theory; European research; gender equality plans; institutional change

1. Introduction

Since the inception of the European Research Area (ERA) in 2000, gender equality has gained increasing attention in European research and innovation (R&I). Over time, policy frameworks have shifted from addressing numerical representation and individual disparities ("fixing the women") to tackling systemic challenges ("fixing the institutions" and "fixing the knowledge"; Ryan & Morgenroth, 2024; Schiebinger, 2016). This evolution acknowledges that achieving gender equality transcends numerical targets, requiring profound changes to institutional structures, cultural norms, and embedded practices that sustain inequality.

In 2009, the European Commission adopted a "structural change" approach as a cornerstone strategy for fostering gender equality in R&I, making gender equality plans (GEPs) the primary tool for institutional transformation. During the 7th Framework Programme for R&I (FP7, 2007–2013) and its successor, Horizon 2020 (H2020, 2014–2020), this approach was operationalised through projects aimed at implementing GEPs in both research performing and research funding organisations. GEPs were implemented in over 200 institutions under 30 projects (European Commission, n.d.). The current funding programme, Horizon Europe (2021–2027), has furthered these efforts, requiring all entities applying for funds to possess an *inclusive* GEP, a move aimed at expanding the adoption of GEPs across Europe's academic landscape while fostering the integration of an intersectional perspective that addresses not only gender aspects but also other dimensions of diversity and inequality (European Commission, 2024).

Despite the EU's position as a global leader in promoting gender equality in R&I, both empirical data (European Commission, 2021b) and academic studies (O'Connor & White, 2021b; Wroblewski & Palmén, 2022) indicate that the goal of equality remains elusive. While much of the literature attributes the slow pace of progress to issues in GEP implementation (O'Connor & White, 2021b; Palmén & Kalpazidou Schmidt, 2019; Tildesley et al., 2022), it often overlooks the earlier, foundational stages of change processes—namely, the conceptualisation and planning of these initiatives, where "institutional change" is translated from an abstract ideal into concrete actions. Scholars have already highlighted how variations in framing terms, such as gender mainstreaming, contribute to the policy–practice gap (see Bustelo & Mazur, 2023). We argue that the same logic applies to the notion of institutional change, where inconsistencies in interpretation and application hinder its full realisation.

The concept of institutional change through GEPs remains underexplored, often confined to technical descriptions in guidelines and toolkits. Key resources such as the GEAR tool (European Institute for Gender Equality, 2016, 2022) and Horizon Europe's guidelines for developing and implementing GEPs (European Commission, 2021a) primarily outline operational aspects, offering limited conceptual clarity regarding the ultimate goal of institutional change. Meanwhile, scholars emphasise the inherent complexity of institutional change (Kalpazidou Schmidt & Cacace, 2019) and the challenges of translating policy ideas into effective actions. As Anagnostou (2022) notes, "there is substantial uncertainty as to what the threefold set of gender equality goals defined in the EU's R&I policy actually entails in practice" (p. 80). Do change agents tasked with implementing GEPs share a common understanding of institutional change? Is there alignment between their definitions and those put forth by the European Commission?

This research seeks to fill this gap by examining potential inconsistencies in how institutional change is defined, which may help explain the limited progress toward achieving gender equality in R&I. We pursue three objectives: first, to assess whether a shared understanding of institutional change exists among

diverse stakeholders; second, to analyse how complexity manifests in the planning and design of institutional change actions; and third, to propose a definition of institutional change that is both theoretically grounded and practically applicable.

Theoretically, we adopt a qualitative approach grounded in feminist institutionalist theory, recognising academic institutions as inherently gendered (Acker, 1990, 1992), with potential change emerging through the dynamic and interdependent interaction of structures and agency (Clavero & Galligan, 2020). Furthermore, we integrate complexity theory, framing gender inequality as a "wicked problem" (Cacace et al., 2023) and highlighting the multifaceted, non-linear, unpredictable processes that shape institutional change (Kalpazidou Schmidt & Cacace, 2019). Empirically, our analysis draws on a case study of a H2020 project (GEARING-Roles) aimed at implementing GEPs across six academic institutions. To complement a broader perspective, we also utilise insights from interviews with change agents involved in other GEP-implementing projects under FP7 and H2020.

The article unfolds as follows: The second section introduces European policy articulations on institutional change. The third section outlines the theoretical framework underpinning the analysis. Next, the methodology employed is described, followed by an overview of European-funded GEP-implementing projects and the case study project, GEARING-Roles. The sixth section presents the research findings, examining (a) how different projects approached institutional change, (b) how change agents conceptualised it, and (c) how GEP implementers reported institutional changes to the European Commission, and how the Commission, in turn, evaluated and classified these reported changes as institutional change or not. Finally, the conclusions reflect on the implications of institutional change definitions in policy implementation.

2. European Policy Articulations on Institutional Change

The concept of institutional change in European policy has evolved from its initial framing as "structural change," often used interchangeably with "structural and cultural change" and "organisational change" (e.g., European Commission, 2015). Since 2017, key documents such as European Commission communications and Council of the EU conclusions have exhibited a subtle yet notable shift toward the term "institutional change" (e.g., European Commission, 2017, 2020), though this evolution has occurred without explicit clarification of its rationale or implications.

A closer examination of reference documents that have guided European-funded GEP-implementing projects reveals how institutional change has been articulated over time. The 2012 benchmarking report *Structural Change in Research Institutions: Enhancing Excellence, Gender Equality and Efficiency in Research and Innovation* (European Commission, 2012) stated that "'structural change' in universities and research institutions means making them more gender-aware, thereby modernising their organisational culture" (p. 14) and that "it implies systemic, integrated, long term approaches rather than piecemeal short term measures" (p. 15). This systemic perspective laid a conceptual foundation for subsequent gender equality policies and initiatives in R&I.

While direct definitions of institutional or structural change were absent in the calls for project proposals, the focus of these calls remained consistent: promoting women's participation and career advancement in research. Under FP7, the emphasis was on increasing women's representation and improving their career prospects. In H2020, this focus expanded to include removing barriers to the recruitment, retention, and

career progression of female researchers. Additionally, the 2012 report brought attention to the need to integrate the gender dimension into curricula and research content—an objective reflected in all calls from 2013 onwards. Leadership development was also mentioned as a key area for GEPs, but it was not until H2020 that addressing gender imbalances in decision-making processes became an explicit and core objective. Although these calls and respective Work Programmes outlined specific objectives related to institutional change, along with recommended strategies and expected impacts, they fell short of providing a clear, singular definition for the concept. Instead, institutional change was presented as part of a multi-goal strategy for achieving gender equality in R&I.

Another significant reference for GEP-implementing projects is the GEAR tool, which provides detailed guidance to R&I organisations throughout the various stages of GEP implementation. Since its first publication in 2016, the GEAR tool has been mandated as a primary resource for GEP projects. According to its 2016 definition, "institutional change is a strategy aimed at removing the obstacles to gender equality that are inherent in the research system itself, and at adapting institutional practices" (European Institute for Gender Equality, 2016, p. 7). While the updated 2022 edition did not introduce substantial changes to this definition, it did emphasise intersectionality as a transversal approach to GEPs and, therefore, to institutional change (European Institute for Gender Equality, 2022).

Overall, European policy documents and tools primarily provide operational guidance for implementing GEPs, focusing on intervention areas and process-oriented strategies rather than offering a precise definition of institutional change. If we summarise the foundational representation of how institutional change processes and objectives in the R&I sector are currently articulated at the European policy level, a baseline depiction could take the form depicted in Figure 1.

3. Theoretical Framework

3.1. Feminist Institutionalism: A Lens for Institutional Change in Academia

Scholars in political science and organisational studies have long highlighted the inherently gendered nature of institutions (Acker, 1990, 1992; Beckwith, 2005; Connell, 1987, 2002; Hawkesworth, 2005). Feminist institutionalists argue that institutions do not merely reflect societal gender norms but that these norms are embedded within their logics, shaping day-to-day operations and decision-making. Feminist institutionalism highlights how institutions follow a "gendered logic of appropriateness," where formal and informal rules "prescribe (as well as proscribe) 'acceptable' masculine and feminine forms of behavior, rules, and values for men and women within institutions" (Chappell, 2006, p. 226). These rules, operating in interconnection with gendered power dynamics, shape both institutional continuity and change.

While institutions are typically stable and resistant to immediate change, they remain capable of evolving over time. Change is rarely abrupt but unfolds through gradual, incremental processes characterised by small steps, occasional progress, and setbacks (Krook & Mackay, 2011). As Mackay (2014) explains, institutional transformation occurs through "bounded agency," where efforts to advance gender equality are shaped and often constrained by structural barriers and opposition from resistant actors.

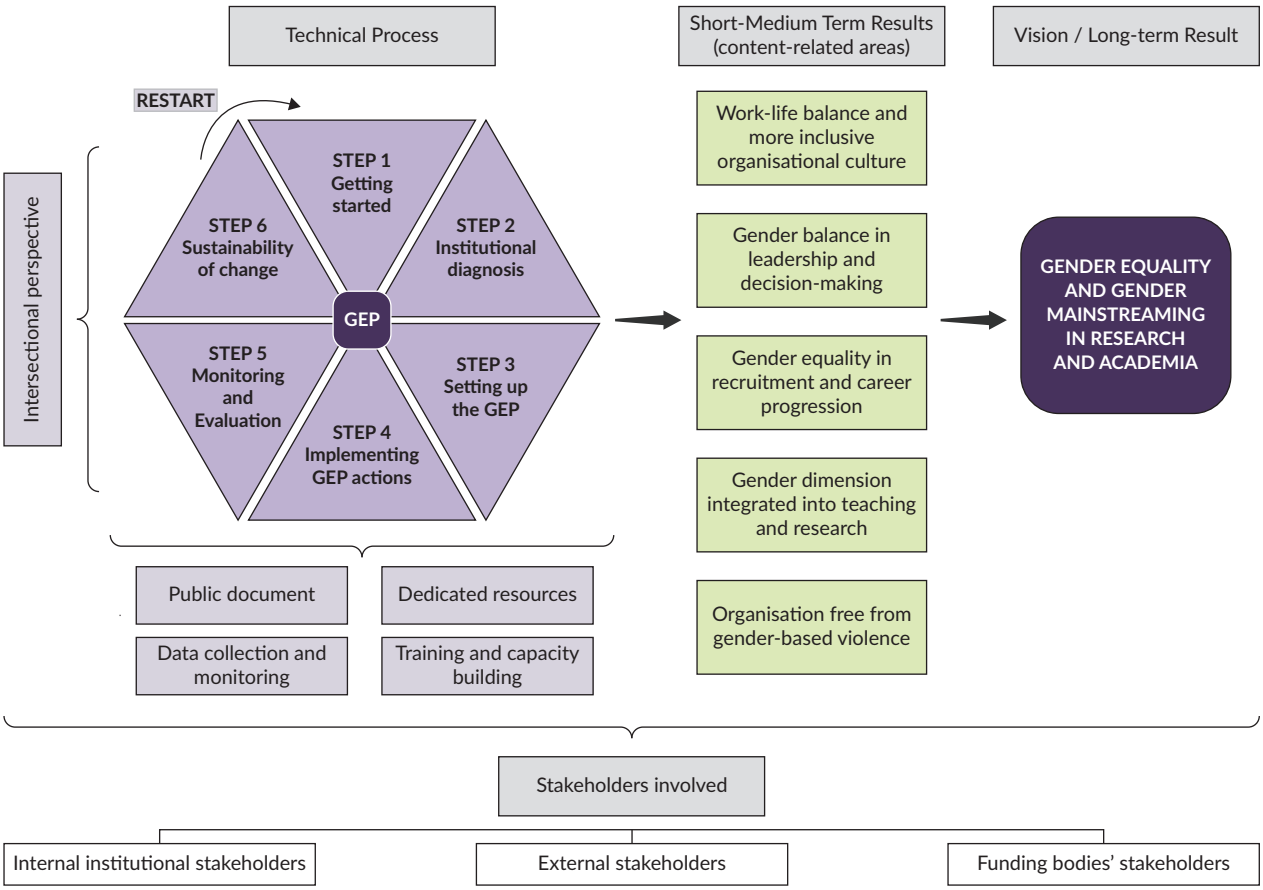

Figure 1. Current baseline depiction of institutional change in European R&I (self-elaborated, inspired by Derbyshire et al., 2015, p. 8).

Academic institutions, much like other political institutions, "sit in the crossroads of social, cultural and economic pressures" (Weimer & Terhi, 2020, p. 1), and are subject to the systemic influence of institutional norms shaped by gender (Lowndes, 2014). Thus, while originally developed to study gender reform in conventional political settings, feminist institutionalism has been increasingly applied to the academic context, where it offers a valuable lens for examining the intersection between gender and institutional transformation (Bencivenga, 2019; Cannito et al., 2023; Clavero & Galligan, 2020; O'Connor & White, 2021b; O'Mullane, 2021; Tildesley et al., 2022). Recent studies have shown how formal policies promoting gender equality are often undermined by informal norms that perpetuate gendered power dynamics, such as biased interpretations of "merit" or exclusionary networking practices (Bencivenga, 2019; O'Connor & Barnard, 2021). Feminist institutionalism has also provided valuable insights into how feminist change agents strategically navigate institutional structures to advocate for transformative change even in highly resistant contexts (Linková & Mergaert, 2021; O'Connor & White, 2021a; Tildesley & Bustelo, 2024; Tildesley et al., 2022).

Applying feminist institutionalism to academia, however, requires a tailored approach, as academic institutions hold their own set of characteristics, and "an isomorphism with political institutions cannot be assumed" (Clavero & Galligan, 2020, p. 662). Their role in knowledge production and epistemic authority introduces unique challenges, as academic value is frequently measured through traditional ideals of academic "merit" and "excellence," ideals which persistently marginalise women and other underrepresented

groups (Calaza et al., 2021; O'Connor & Barnard, 2021). Gender reform in academic contexts must address a "dual logic," targeting both organisational and epistemic dimensions that underpin institutional practices (Wroblewski & Palmén, 2022). The epistemic logic, where traditional notions of academic merit and excellence are entrenched, is particularly difficult to transform (Clavero & Galligan, 2020), and while gender equality initiatives often target the organisational logic, practices rooted in the epistemic logic frequently remain untouched (Albenga, 2016; Picardi et al., 2023; Wroblewski & Palmén, 2022).

3.2. Unpacking Complexity

Some scholars describe gender inequality in academia as a "wicked problem" due to its deep-rooted, multifactorial causes, resistance to universal solutions, and contextual dependence (Cacace et al., 2023; Kalpazidou Schmidt et al., 2020). Institutional change within this framework is non-linear, and outcomes are shaped by interactions among numerous variables, making predictability difficult (Kalpazidou Schmidt & Cacace, 2017).

Kalpazidou Schmidt and Cacace (2019) propose three parameters characterising complexity in GEP implementation. First, a *holistic view of structural change* requires addressing multiple dimensions, combining approaches such as "fixing the women," "fixing the institution," and "fixing the knowledge" concomitantly. Second, strategies are developed through a *multidimensional notion of power*, meaning that power relations are considered at interpretive, symbolic, institutional, and operational levels (see also Mergaert et al., 2022). Third, *institutional change is viewed as social change*, placing emphasis on activation mechanisms, mobilising agency, accounting for resistances, and attending to the interaction between agency dynamics and structural circumstances.

This study identifies four additional factors that characterise complexity in GEP implementation in academia. First, the *depth of implemented actions*. True institutional change requires transforming organisational structures, logics, and culture rather than relying on less disruptive measures often chosen due to institutional inertia or resistance (Bustelo, 2023). Scholars classify interventions into two categories: structural change measures (e.g., modifying policies and procedures) and preparatory actions (e.g., awareness-raising and training; Sangiuliano et al., 2019). The balance between these two types of interventions is crucial to achieving transformative changes, as an over-reliance on preparatory actions may indicate resistance to deeper transformations.

Second, *flexibility and adaptability*. Institutional change is inherently non-linear and unpredictable, requiring strategies that adapt to shifting contexts and emergent opportunities. As Mergaert et al. (2022) observe, change depends on relationships and context-specific dynamics, with no guarantee that past successes can be easily replicated. In such a context, rigid approaches are ineffective, and dynamic frameworks become essential for sustainable progress (Bustelo, 2023).

Third, addressing the "*dual logic of academia*" (the organisational and the epistemic) simultaneously (Wroblewski & Palmén, 2022). The complexity lies in reshaping the epistemic logic, which involves not only altering organisational structures but also challenging the foundational principles that govern knowledge production and validation within the broader academic system. As Clavero and Galligan (2021) note, "action aimed at effecting institutional change in academic organisations needs to tackle both epistemic privilege

and discrimination, reset a traditional culture that normalises unequal gendered expectations and behaviors, and distribute epistemic-supporting resources in a gender-just manner" (p. 14).

Finally, *contextual differences* add another layer of complexity to institutional change. GEPs, while framed as transnational models, are political processes influenced by local cultural and organisational factors. When policies are translated into actions, they often undergo adaptation, resulting in variations in meaning and application across contexts (Ní Laoire et al., 2021). Tailoring strategies to these specificities is essential to avoid reducing policy goals to technical solutions that neglect local realities. Nevertheless, maintaining a minimum harmonised understanding is crucial for effectively monitoring progress towards a broader collective goal.

We summarise the key parameters that will frame our analysis of how change processes are received, interpreted, and reshaped by different stakeholders at the GEP planning and design stage: adopting a holistic perspective on institutional change that addresses diverse targets; employing a multidimensional approach to challenge gendered institutional power across various levels; understanding institutional change as social change, requiring simultaneous attention to structural adjustments and agency activation; maintaining a balance between structural change interventions and preparatory actions; embracing non-linearity and unpredictability, ensuring flexible and adaptable strategies; addressing the dual logic of academia by engaging with both organisational structures and epistemic frameworks; and considering the influence of contextual specificities on change initiatives' design and implementation.

4. Methodology

The empirical data for this research derives from two sources: (a) a case study of the GEARING-Roles project, where the authors were part of the coordination team, and (b) interviews with change agents from other FP7 and H2020 GEP-implementing projects.

For the GEARING-Roles case study, we employed a multi-method approach to data collection. Initially, we developed a document analysis of key project materials, including the GEPs of six implementing partners, project reports, and evaluation documents (26 total). Thematic coding identified patterns related to institutional change definitions, GEP implementation processes, and reporting. Additionally, participant observation (Patton, 2002; Pauly, 2010) was conducted over three years (2020–2022) during 49 follow-up meetings and project events. Finally, semi-structured interviews (Denzin & Lincoln, 2017; Patton, 2002) were conducted with 10 participants, including GEP coordinators, project coordinators, the technical support partner, and the evaluator.

To complement the GEARING-Roles insights, 16 interviews were conducted with change agents representing other FP7 and H2020 GEP-implementing projects. Respondents were selected based on their roles within the structural change project community, ensuring a diverse representation in terms of geography and institutional type. Priority was given to project coordinators, evaluators, or technical support partners, as their roles provided critical insights into GEP implementation and evaluation in various institutional settings. All interviewees were either academics (with or without gender and institutional change expertise) or equality officers.

As shown in Table 1, a total of 24 participants were interviewed, with only one male, highlighting the gendered dynamics of participation in GEPs in academia. The full sample collectively covered insights from 21 projects. Interviews took place between January 2022 and December 2023, primarily through online video calls, with two being in person. Questions focused on participants' understanding of institutional change, the alignment of their interpretations with those of the European Commission, and the evaluation of specific actions. To ensure confidentiality, interviewees were anonymised using numerical identifiers and group samples (e.g., I1_GR for GEARING-Roles' participants; I11_SP for sister project representatives).

Table 1. Interview respondents' details.

Respondent code	Gender	Role	Experience level in institutional change initiatives
I1_GR	Female	Full professor	Expert
I2_GR	Female	Associate professor	Experienced practitioner
I3_GR	Female	Full professor	Active participant
I4_GR	Female	Full professor	Active participant
I5_GR	Female	Associate professor	Expert
I6_GR	Female	Full professor	Expert
I7_GR	Female	Associate professor	Active participant
I8_GR	Female	R&D analyst	Active participant
I9_SP	Female	Full professor	Experienced practitioner
I10_SP	Female	Research director and senior consultant	Expert
I11_SP	Female	Senior researcher and project manager	Expert
I12_SP	Female	Associate professor	Expert
I13_SP	Female	Diversity and inclusion coordinator	Active participant
I14_SP	Female	Full professor	Active participant
I15_SP	Female	Project manager	Active participant
I16_SP	Female	Director equality, diversity and inclusion, and associate professor	Expert
I17_SP	Female	Senior researcher and project manager	Expert
I18_SP	Female	Senior researcher	Expert
I19_SP	Female	Principal research associate and associate professor	Experienced practitioner
I20_SP	Female	Senior researcher	Experienced practitioner
I21_SP	Female	Senior researcher	Expert
I22_SP	Male	Senior researcher	Expert
I23_SP	Female	Senior researcher	Experienced practitioner
I24_SP	Female	Senior researcher	Expert

Notes: Active participant = regular engagement in equality-related initiatives, contributing to both planning and implementation; experienced practitioner = sustained experience, often leading specific activities and projects; expert = extensive experience, typically in leadership or decision-making roles, designing, implementing, or evaluating major gender equality programmes or policies in various settings; I9_SP and I10_SP were interviewed both as members of GEARING-Roles and as change agents with extensive experience in other sister projects, but to maintain consistency, their acronyms will remain "SP."

Interviews were transcribed and analysed using reflexive thematic analysis to identify key project approaches to institutional change, participants' interpretations of the concept, and their alignment with the definitions set out by the European Commission.

For the scope of this study, as both researchers and change agents committed to transforming the academic system (Haraway, 1988; Silvestre et al., 2020), we position ourselves as feminist critical friends (Campanini, 2024; Chappell & Mackay, 2020) to the change agents involved in this research. We approach the cases analysed from an insider, yet critical, perspective, recognising the complexity and non-linear nature of institutional change while drawing conclusions.

5. GEP-Implementing Projects and the GEARING-Roles Case

Early initiatives funded to implement institutional change actions in academic organisations began under FP7, piloting interventions addressing mainly female career progression, leadership, decision-making, and integrating the gender dimension into research. Over time, these pilot initiatives evolved into more coordinated efforts, eventually taking the form of structured GEPs, reflecting the methodology outlined in the GEAR tool (European Institute for Gender Equality, 2016, 2022).

According to the GEAR tool, a GEP is a strategic framework designed to address gender inequalities through specific actions, targets, and monitoring indicators (European Institute for Gender Equality, 2016). Its aim is to integrate gender equality into an institution's standard practices, transforming its culture and operational systems. Successful GEP implementation ensures that gender equality becomes routine in institutional governance, rendering the plan itself redundant over time (European Institute for Gender Equality, 2022).

Under FP7 and H2020, GEP projects were funded as "coordination and support actions", focusing on activities such as standardisation, awareness-raising, networking, and mutual learning. These projects spanned 3–4 years and involved the design, implementation, monitoring, and evaluation of GEPs. Consortia typically included GEP-implementing partners, coordinators, technical support providers, dissemination leads, and evaluators. Progress was monitored by the European Commission and the European Research Executive Agency (REA) through key performance indicators, reports, and review meetings.

The GEARING-Roles case study project, funded under the H2020 call "SwafS-09-2018-2019-2020—Supporting research organisations to implement gender equality plans," spanned four years (2019–2022), implementing GEPs in five universities and one research funding organisation across six countries (Estonia, Portugal, Slovenia, Spain, Türkiye, and the UK). While following the GEAR tool methodology, each institution tailored its GEP to its needs, with four institution-wide plans and two at the faculty level.

By the time GEARING-Roles was implemented, 20 EU-funded GEP projects had already been completed or were underway, which provided the project team with a solid knowledge base. Rather than "reinventing the wheel," GEARING-Roles focused on refining and enhancing the existing framework, building on insights and good practices from its predecessors.

6. Interpreting Institutional Change: From Policy to Practice

The empirical findings are structured into four themes. First, we examine how GEP-implementing projects conceptualised institutional change, with a particular focus on the GEARING-Roles case study. Next, we analyse how change agents interpret the concept, regardless of project-level definitions. We then assess whether there is alignment between the definition of institutional change adopted by GEP implementers and that of the European Commission, specifically the REA, which reviews and evaluates project reports. This includes analysing how GEP teams reported "institutional changes" to the Commission and, conversely, how the Commission assessed these reported changes—whether they were acknowledged as institutional changes.

6.1. Approaches to Institutional Change: Project Perspectives

From a project perspective, a recurring theme is the initial absence of a standardised definition of institutional change. This reflects the experimental nature of GEPs in European-funded initiatives, often described as "laboratories" (I23_SP) or spaces for "trial and error" (I13_SP). As part of a learning process, the solidification of more structured methods and definitions typically unfolds during the project's lifecycle, with initial ideas being adapted in response to new insights and shifting priorities (I10_SP, I19_SP, I21_SP).

Comparing FP7 and early H2020 projects with mid-to-late H2020 initiatives reveals a notable evolution in GEP strategies, marked by a transition from broad, undefined goals to more precise, actionable plans. This transition reflects an iterative learning process, where initial understandings of gender equality itself—often narrowly focused on numerical representation—gradually evolved into more sophisticated, multidimensional approaches to institutional transformation (I12_SP, I13_SP).

Looking at the processes adopted by GEP teams to establish their approaches to institutional change, our findings indicate that, in earlier initiatives, project partners devoted more attention to formal discussions aimed at defining institutional change before initiating actions (I11_SP, I16_SP, I23_SP). This focus stemmed from the absence of precedents to inform their strategies (I14_SP). In turn, with the creation of tools specifically tailored to the European context, notably the 2016 GEAR tool, mid-to-late H2020 projects benefitted from a more structured, pre-established framework. Rather than "reinventing the wheel" (I2_GR), they adapted and refined existing frameworks to suit their specific circumstances, streamlining the implementation of GEPs (I8_GR, I12_SP). While this progression facilitated operational efficiency, some respondents highlighted that heavy reliance on pre-existing frameworks might have constrained deeper discussions on the final goal of institutional change, potentially resulting in measures that, though adhering to general operational guidelines, lacked the critical conceptual foundation necessary to foster more transformative change (I11_SP, I13_SP).

In the GEARING-Roles case specifically, participants highlighted the absence of formal occasions where the GEP teams collectively defined institutional change within the project's scope. Instead, early discussions focused on the processual elements necessary for active change, with less emphasis on interpreting the concept as part of broader strategic feminist goals (I6_GR, I7_GR). In this vein, I1_GR highlighted a recurring tendency to prioritise short-term solutions or "patches" that address immediate needs, leading to fragmented GEPs and often undermining long-term strategic objectives aligned with the broader feminist agenda:

> It's important to distinguish between practical needs and strategic interests. Often, we focus on practical needs, which isn't inherently bad, but it doesn't lead to institutional change….Perhaps we are dedicating too much time to the "meantime," and by applying these patches, we fail to generate structural or institutional change because we are not addressing a broader strategic interest. (I1_GR)

Representatives from sister projects echoed these observations, linking the limited theorisation of institutional change to the intervention-oriented focus of GEP-implementing projects, classified as "coordination and support actions." Predominantly operational, these projects demanded significant time and resources for implementation, leaving little room for research activities and conceptual debates (I12_SP, I23_SP). In this context, it often happens that, "initially, everyone assumes that the others have more or less the same idea, and gradually, you realise that things might be a bit more complicated" (I22_SP), as ideas about gender equality and the meanings of institutional change vary significantly across different contexts (see Ní Laoire et al., 2021).

Respondents from the GEARING-Roles project explained that all GEP teams adhered to the five-step methodology proposed by the GEAR tool, while also employing a context-dependent strategy. This allowed for tailored GEPs that addressed the specific conditions of each implementing institution, recognising substantial variations in national and institutional contexts (I1_GR, I2_GR, I4_GR, I6_GR). This adaptability was facilitated through comprehensive baseline gender analyses conducted at each institution during GEP planning. These analyses, often carried out as participatory gender audits, enabled GEP teams to identify context-specific gender issues and prioritise interventions accordingly. For example, institutions with well-established gender equality structures, such as those engaged with the Athena SWAN Charter, used the analyses to refine existing measures and align them with European provisions. Conversely, institutions with limited prior engagement in gender equality initiatives leveraged the audits to raise awareness of gender disparities and build institutional support for change.

Despite not explicitly establishing a shared definition of institutional change, a foundational approach was, in effect, collectively embraced by all GEARING-Roles GEP teams. This approach was largely shaped by the provisions of European policies and guidelines, especially those delineated in the GEAR tool. As noted by I1_GR, although the European Commission does not provide a precise definition of institutional or structural change, it does specify certain areas of intervention (i.e., GEP dimensions) and processual aspects to be followed (i.e., the five-step methodology). These operational guidelines offered a common framework for the GEP teams while also allowing for flexibility in interpreting what constitutes institutional change in practice for each of them.

This context-sensitivity was also identified in sister projects. Interviewees emphasised that the diversity of organisational contexts and expertise among GEP teams complicated the development of a unified approach to institutional change (I12_SP, I16_SP, I17_SP, I20_SP, I21_SP, I23_SP). They highlighted the existence of a "grey zone" (I17_SP) between the overarching policy framework and the specific interpretations of institutional change in different contexts. Geopolitical, cultural, and historical disparities, combined with varying disciplinary backgrounds and levels of gender expertise within consortia, necessitated flexible and adaptable strategies. For example, I13_SP noted that the presence of equality officers in universities varies dramatically across countries. In northern countries such as Germany, such roles are commonplace, whereas in eastern countries, they are virtually non-existent. This disparity reflects differing national and

organisational frameworks but also underscores the need to advocate for foundational structures in settings where gender equality is less established, thus considerably changing the very meaning of institutional change for each of them in practice:

> Thinking of institutional change in all these very diverse institutions, we still, of course, had a common ground, and that's a common ground defined by the European agenda for responsible R&I and the pillars….But then what the outcome is would be hugely different, having in mind huge differences among the particular context….These [cultural] things are usually not quantitatively, easily graspable, but are equally important. (I19_SP)

> In the beginning, there was hardly any definition of what a GEP is, what structural change means, what organisational change means….Imagine a room full of 60 people: old physicists, some younger social scientists, women in gender studies, feminists….We had beginners and then we had quite like superstars, from the northern countries especially. It took us at least six or eight months before we were able to sit down and say, "What is gender equality? What has to be in there [the GEPs]? What is structural change? (I13_SP)

The generational learning evident in the transition from earlier FP7 projects to H2020 initiatives reveals an iterative process of refining institutional change strategies and a clear progression towards more structured approaches to GEPs. This evolution reflects both the collective learning achieved and the persistent challenges of navigating contextual diversity. While structured methodologies such as the GEAR tool have facilitated operational consistency, they have also raised concerns about inclusivity and representation within the community of scholars and practitioners engaged. Some respondents expressed concerns about the dominance of a small group of institutions, often from northern and western European countries, which have significantly influenced the initial frameworks for institutional change. This dominance raises questions about the diversity of perspectives contributing to the existing models (I19_SP, I23_SP). As newcomers adopt these frameworks, there is a risk of sidelining institutions and countries less involved in the initial discussions, potentially overlooking their unique interests and challenges (see Anagnostou, 2022).

6.2. Approaches to Institutional Change: Change Agents' Perspectives

Shifting from the perspectives of project consortia to those of individual change agents, this section delves into how these agents define institutional change. The interviewees reveal a multifaceted understanding, highlighting the complexity of crafting a universal definition of institutional change, as change processes may vary significantly depending on contextual factors.

When prompted to share their own interpretations, GEP coordinators from GEARING-Roles primarily framed institutional change in operational terms related to GEP implementation. Most interviewees associated the notion with addressing gender issues across the five intervention areas outlined in the GEAR tool: work–life balance, recruitment and career progression, leadership and decision-making, research and curricula, and gender-based violence (I1_GR, I2_GR, I4_GR, I5_GR). One interviewee emphasised transforming institutional values and culture as central to institutional change (I3_ GR), while others highlighted the creation of new structures, such as equality bodies (I6_GR, I7_GR). Notably, one respondent explicitly linked institutional change to "something that is really permanent, that will outlast the project" (I8_GR).

Broadening our scope, change agents representing sister projects offered diverse yet interconnected perspectives. While some aligned with an operational understanding of institutional change, focusing on the requisites for GEP implementation (I9_SP, I15_SP), others engaged with broader conceptual debates. Reflecting on a general interpretation, I10_SP defined institutional change as follows:

> [Institutional change consists in] the changing of the procedures, the processes, and the values of the organisation, formally and informally. So, formal and informal values, the ways of dealing with each other, institutional culture as well, so it's rather a broad concept. So, the changes towards gender equality, of course, in all these formal and informal elements of the organisation. (I10_SP)

Complementing this perspective, I11_SP and I24_SP outlined that institutional change should be linked to comprehensive strategies that address the interpretive, symbolic, institutional, and operational dimensions of change. Furthermore, I11_SP expanded the concept, placing it within the broader scope of social change. In this definition, institutional change transcends the confines of organisational structures to both influence and be influenced by wider societal norms and structures:

> This notion is so wide that we cannot avoid equating it a bit to the notion of social change, because we are talking about gender, which is a basic structure of human and social identity of people, and it permeates all levels of social life….If people are involved, if change is really structural, this will be social change, so it's much broader. (I11_SP)

These contributions align with feminist institutionalist perspectives, which emphasise institutional change as addressing both the tangible elements of an organisation and the intangible cultural symbols and logics that underpin its functioning (Krook & Mackay, 2011). Nevertheless, while these perspectives offer essential insights for constructing a theoretical framework on institutional change, it is necessary "to make a distinction between a theoretical understanding and a practical understanding" (I10_SP), recognising that "it's a practice-based approach" (I22_SP).

In more practical terms, I12_SP, I20_SP, and I22_SP described institutional change as recognising the shift from seeing gender issues as isolated challenges facing individual women to framing them as broader institutional and systemic concerns. As I17_SP argued, institutional change is "a combination of equal opportunities, positive, and gender mainstreaming actions aimed at transforming the entire operation of research institutions."

Practically, there is a recognition that institutional change in academia holds a twofold objective: on the one hand, altering organisations, and on the other, transforming the broader academic system beyond individual organisational settings (I17_SP, I20_SP, I21_SP, I22_SP). I17_SP explained:

> The aim is to stimulate inward and outward change at the same time and to set up synergies with targeted external stakeholders so that, at the same time, there are certain actions in the GEPs that are both favouring internal change and triggering change in the European Commission system. (I17_SP)

These ideas highlight the necessity of addressing the "dual logic" of academia, targeting not only organisational but also epistemic dimensions that underpin academic practices (Wroblewski & Palmén,

2022). In this view, change is not about temporary fixes or surface-level adjustments, but a profound, systemic overhaul aimed at rectifying the embedded inequalities within organisational and systemic logics to ensure that gender inequalities are addressed at their structural roots.

As several respondents emphasised, institutional change should be viewed as lasting, sustainable transformation, enduring alterations that extend beyond transient initiatives or short-term projects (I13_SP, I14_SP, I15_SP, I16_SP, I18_SP). Examples of such enduring changes included consistent monitoring and reporting of gender metrics, dedicated budgets for gender equality, and modifications in strategic documents and organisational procedures. This approach would ensure that progress is not eroded but instead built upon, creating a cumulative effect that fosters continuous improvement (see Kalpazidou Schmidt et al., 2020; Palmén et al., 2019).

Further developing this understanding, interviewees discussed the introduction of intersectionality into GEPs, which broadens the notion of institutional change to encompass dimensions beyond gender. While some institutions have integrated intersectional practices into their GEPs, the depth of implementation remains inconsistent. Challenges include the conceptual ambiguity of intersectionality, a lack of practical examples, and limited institutional data due to regulatory and privacy limitations (I2_GR, I4_GR, I6_GR). Concerns were raised about whether prioritising intersectionality might dilute the focus on gender or vice versa (I24_SP). Despite these barriers, interviewees emphasised the need for pilot initiatives, capacity building, and explicit guidance from the European Commission to support the practical implementation of intersectionality in institutional change efforts (I13_SP, I20_SP, I23_SP).

In sum, comparing the projects' approaches and change agents' interpretations, two key insights emerge. First, there is a notable lack of in-depth discussion among GEP implementers across project consortia regarding the conceptualisation of the institutional change goal. This has resulted in the absence of a clear, shared definition—a challenge that is further complicated by contextual differences in interpreting the concept. Second, change agents' definitions also vary: some emphasised the operational aspects of institutional change, while others critically reflected on its conceptual foundations. While the absence of a precise definition has allowed GEP implementers to adapt to the unique contexts of different institutions, it has also created uncertainties and inconsistencies in how concrete GEP actions are interpreted and evaluated by the European Commission and the GEP teams themselves, as will be examined in the following section.

6.3. Ambiguities in Reporting and Evaluating Institutional Change

This section examines how GEP teams in both GEARING-Roles and other sister projects reported institutional changes to the European Commission (specifically, REA), focusing on the rationale behind classifying specific actions as indicative of institutional change. This analysis offers insights into how institutional change was conceptualised and operationalised in practice.

6.3.1. The GEARING-Roles Case

Throughout GEARING-Roles, REA provided partners with specific reporting tools to document institutional change actions. These mechanisms included an Excel-based reporting template for the first two reporting

periods (2019 and 2020) and an online questionnaire for the final reporting period in 2021. While these tools were intended to standardise reporting and align institutional change actions with the dimensions of responsible research and innovation (RRI), they also introduced significant challenges.

In the Excel-based format, partners were instructed to document institutional change actions and categorise them under predefined dimensions ("public engagement," "gender equality," "science education," "open access/data," "ethics," or the comprehensive "RRI package"). Guidelines provided examples of institutional change actions, emphasising changes to governance or institutional structures that were expected to have meaningful and lasting impacts beyond the project's duration. However, the open-ended nature of these guidelines left considerable room for interpretation, resulting in diverse approaches to classifying and reporting actions.

Project partners faced ambiguity regarding which activities qualified as institutional changes. For instance, interviewees noted that while the Excel format offered flexibility, it also required teams to rely heavily on individual judgment to interpret the guidelines, which were perceived as insufficiently clear (I6_GR):

> We had to fill some tables with this kind of information where there has been some discussion about what can be inserted there and what cannot….Everybody can interpret it a little bit differently….Where some institutions have marked something as institutional change, I wouldn't necessarily say it is. (I8_GR)

This lack of clarity led to variations in what was reported as institutional change, even when similar actions were implemented across institutions. For example, while most partners addressed gender equality through mentoring programmes, training and capacity building, and awareness-raising activities, not all reported these efforts as institutional changes.

The transition to the online questionnaire in the 2021 reporting period aimed to streamline the process by providing a predetermined list of institutional change action types. This format implicitly constrained partners' interpretations by narrowing the scope of what could be reported. While the online tool allowed for "other" actions to be added, its structured format discouraged the inclusion of less conventional or indirect initiatives. Consequently, partners reported fewer actions compared to earlier periods, potentially underrepresenting the breadth of their institutional change efforts.

An analysis of the reported institutional change actions in such periods reveals both commonalities and variations across the GEP-implementing institutions. Actions reported by all partners included the development, approval, and implementation of GEPs, and the establishment of gender equality structures and personnel. However, discrepancies emerged in the reporting of other initiatives. For instance, some institutions reported the creation of institutional prizes for gender-related research as an institutional change, while others implementing similar initiatives did not. Similarly, actions such as reviewing recruitment and promotion policies, addressing the gender wage gap, and enhancing mechanisms to prevent sexual harassment were inconsistently reported as institutional changes. One interviewee attributed these variations to differences in interpretation, stating the following:

> We would say, "Oh, these people [other partners] have written about this as institutional change," and until then it would not have occurred to us….We are doing it, but we are not considering it as something that should be put in that report. (I6_GR)

These variations underscore the subjective nature of the reporting process, which relied heavily on individual teams' interpretations of institutional change. Notably, it is important to recognise that the cultural and institutional contexts in which these interpretations occurred play a significant role. What may be perceived as smaller, less significant changes in some institutions could, in fact, be regarded as larger, more important changes in others, particularly in contexts marked by entrenched inequality or where the institution has only recently begun to engage seriously with gender equality issues.

REA provided feedback on the institutional change actions reported by partners, evaluating their alignment with the criteria outlined in the reporting guidelines. This feedback aimed to clarify which actions qualified as institutional changes and to ensure consistency across projects. However, an analysis of REA's feedback reveals further inconsistencies and ambiguities in the evaluation process. For example, REA's feedback emphasised that institutional changes must involve modifications to governance or institutional structures and have a lasting impact. Actions deemed "one-off" activities, such as workshops or events, were excluded from this classification. Despite this, some reported actions that aligned with these criteria were not recognised as institutional changes, while others with less evident structural impacts were accepted. This variability in feedback added to the uncertainty faced by GEP teams, as noted by I5_GR: "It's just such a nebulous concept…trying to capture it with those batteries of indicators doesn't fully reflect what institutional change actually entails."

Another challenge in reporting institutional change was the exclusion of indirect initiatives, such as capacity-building and training activities, from the REA's definition of institutional change. While these activities do not directly modify institutional structures, they play a critical role in fostering cultural and behavioural shifts that underpin sustainable change. One interviewee argued that capacity-building efforts "can lead to institutional change" by shaping attitudes and practices, even if they are not immediately recognised as structural modifications (I7_GR). Respondents argued, for instance, that training sessions on inclusive leadership and unconscious bias, while classified as awareness-raising activities, contribute to long-term institutional change by equipping individuals with the knowledge and skills to challenge gender inequalities within their organisations. Similarly, initiatives to integrate gender perspectives into curricula and research foster systemic change by embedding inclusivity into core institutional functions. However, these contributions were often overlooked in the reporting process due to the narrow focus on changes in formal structures.

The rationale employed by REA to classify reported actions as "institutional changes," "not institutional changes," or "potential institutional changes" (for initiatives requiring further development) remains somewhat ambiguous. The feedback provided lacked detailed explanations for these classifications, leaving GEARING-Roles partners uncertain about how to accurately identify and report concrete actions as indicative of institutional change. This ambiguity had several implications for the GEARING-Roles project: It created disparities in how different GEP teams' efforts were represented, potentially underestimating—and also overestimating—their contributions; hindered the development of a shared understanding of institutional change within the consortium; and highlighted the limitations of the European Commission's reporting tools, which prioritised standardisation yet lacked a clearly defined understanding of what was expected from partners and what qualified as institutional changes.

6.3.2. Sister Project Experiences

Echoing the perceptions of respondents from the GEARING-Roles project, representatives from sister projects also expressed concerns regarding the European Commission's communication of the concept of institutional change, noting a general lack of clear guidelines and a cohesive vision for what institutional change actions should encompass:

> I don't think that the European Commission has any clear guidelines for what institutional change entails….I consider them very bureaucratic; it is the box-ticking issue. We have to confirm their language, refer to the gender dimension of research, show that our research teams are gender diverse, and that we have clear objectives and that these objectives can be measured at certain moments in time. But I don't think it's a clear vision of what structural transformation entails. (I9_SP)

Similarly, while interviewees appreciated the Commission's role in funding projects and entrusting experts to define concepts and create resources such as the GEAR tool (I10_SP, I18_SP, I23_SP), many expressed a need for additional support (I9_SP, I11_SP). This sentiment underscores a broader ambiguity among sister project representatives concerning the Commission's expectations for GEPs, particularly regarding report and evaluation processes. These concerns spotlight the challenge of effecting structural changes within the constraints of project timelines and point to a perceived disconnect between the support provided by the Commission and the needs of project implementers:

> To be honest, we didn't have any sort of control, because what we reported definitely wasn't institutional change….The project's lifetime was just, I think four or three years….We can't see structural change in that timeframe….I don't think they [European Commission] scrutinise it at all….And because I would've had a lot of criticism on our own work—and that never came from the Commission on a qualitative level—I think we might have been confronted with very well-meaning people who just said, "You're doing something good for women, good for you," and a pat on the back. And that was it. (I15_SP)

> I don't want to be rude or anything, but I didn't get any idea that I got help from the European Commission….Of course, in the European Commission, there are a lot of experts, and they have guidelines and reports, etc., and those are very helpful….But when you have a grant agreement, you have to do it with the project officer, and having been in EU projects since 2004, I can see that the project officers now have less and less interest in the topic you're dealing with….There used to be project officers really…interested in the topic, and who could really tell you something….I don't see that as a strong suit of the system right now. (I20_SP)

GEP teams reported changes in ways that lack consistency, often viewing reporting mechanisms as procedural rather than substantive, and their evaluation processes failed to capture the complexity of institutional transformation:

> They [GEP implementers] have to report back what they promised at the beginning of the project and if they fulfilled their promises at the end. And the point is: For a critical evaluator, that doesn't relate to transformational or institutional change at all; it just relates to the effectiveness of a project. So, they

> report in a very instrumental way and reporting mechanisms don't stimulate [us], per se, [to] have a very good overview of our institution's transformation. (I9_GR)

I17_SP and I18_SP recalled that external experts with potentially varying understandings of what constitutes institutional change are brought in to assess the project's progress, and that their interpretations may be stricter and not fully align with the broader, more inclusive definitions envisioned by project implementers:

> I remember that in [project name]—and this came quite late after the project was concluded—we received by the project officer a post-project review where they took the entire table of the changes that we reported in each organisation, and they were marking what they considered structural and what they didn't consider structural. And we came to an understanding that they had a more restrictive definition probably of what was to be considered structural and what was not. (I17_SP)

The challenges in the evaluation process were further elaborated by I12_SP, who noted the following:

> There are a number of actors within the European Commission who do have a clear understanding of the structural change approach, and then many, many others who do not. This is completely reflected in everything, from how proposals are evaluated to how follow-ups are conducted. (I12_SP)

I12_SP criticises, for instance, the problematic focus on gender balance within project teams—particularly the perceived issue of insufficient male representation—and the reliance on quantitative KPIs for evaluations, highlighting that "structural change is a matter of process, and it's necessary to define it as such and then look for intermediate results and impact, etc."

7. Conclusions

This study highlights how inconsistencies in framing institutional change contribute to the uneven and slow progress toward gender equality in academia. A critical issue lies in the lack of clarity surrounding the concept of institutional change, which directly influences the design and execution of GEPs. Our findings confirm that the complexity previously identified in the implementation of GEPs (Kalpazidou Schmidt & Cacace, 2019) extends to the planning and design phases, where translating broad policy objectives into actionable strategies is complicated by the difficulty in defining a clear and shared goal of institutional change.

While European policies offer an operational common basis for GEP implementers, considerable inconsistency remains in how stakeholders interpret institutional change. A fundamental is the difficulty of translating broad, policy-level objectives into targeted, context-specific initiatives. This echoes feminist institutionalist perspectives that view institutions as both structural and cultural entities, where formal and informal rules intersect with broader gendered social norms (Krook & Mackay, 2011). The process of moving from policy to practice involves navigating this dynamic interplay between institutional norms, the agency of those driving change (as well as resistant actors), and the overarching goals of European policies. As discussed elsewhere (e.g., Ní Laoire et al., 2021), despite a unified policy framework, implementation takes on different meanings across contexts, and we argue that definitions do as well.

Further complicating matters, our case study revealed inconsistencies in how the European Commission evaluated and classified GEP actions as institutional change. Divergent interpretations of similar actions by the REA created uncertainty among GEP implementers regarding expected outcomes. Such inconsistencies highlight the uneven prioritisation of gender equality within the Commission itself and underscore the need for greater internal cohesion and sustained efforts to advance the agenda (Mergaert, 2012).

On the one hand, as some respondents noted, the conceptual ambiguity around institutional change often results in fragmented GEPs with a short-term focus, lacking a long-term vision aligned with the broader feminist agenda. While flexibility is essential for tailoring GEPs to local realities, the absence of consistent evaluation criteria and clear goals hampers progress monitoring, benchmarking, and collaboration. On the other hand, imposing fully standardised definitions risks reinforcing the "technicalisation" and consequent depoliticisation of institutional change initiatives. Institutional change is inherently political, shaped by power dynamics, resistance, and negotiation. Overly rigid definitions may reduce GEPs to compliance-driven exercises, stripping them of their transformative potential.

In the European context, where GEP policies are increasingly harmonised yet implemented within vastly different institutional, cultural, and political landscapes, balancing coherence and adaptability is crucial. A shared understanding of institutional change can provide much-needed direction, but it must not translate into a one-size-fits-all approach that disregards local specificities. The challenge lies in developing frameworks that offer clear guidance while allowing institutions the autonomy for meaningful, context-sensitive change. As Kalpazidou Schmidt and Cacace (2019) note, "a difficult balance is indeed to be found between flexibility and adaptation, on the one hand, and the need to outline a path and provide indications for action, on the other" (p. 324). Finding this balance requires both conceptual clarity and mechanisms to prevent institutional change from becoming a depoliticised bureaucratic exercise.

This need raises the question of whether we should "fix the method" by restructuring initiatives to better address the challenges and contextual diversities faced by stakeholders. Instead of large-scale, pan-European projects that bring together highly diverse institutions, a more regionally focused model should be further explored—an approach already being implemented through the WIDERA work programmes. A regional model may allow for more targeted interventions tailored to the specific needs and constraints of institutions within similar socio-political environments; however, this shift must be carefully designed to avoid unintended consequences, such as reinforcing regional divides or excluding institutions that could benefit from transnational collaboration.

To conclude, recognising that institutional change is both a conceptual and practical endeavour, and aligning with this article's objective of defining institutional change, we contribute to the discourse on GEP-driven transformation in academia by offering a dual approach: a theory-based definition that situates institutional change within existing scholarly debates, and a practice-oriented definition that reflects its operationalisation in real-world contexts. By bridging these perspectives, we aim to provide a more comprehensive understanding of how institutional change unfolds through GEPs, addressing both its theoretical underpinnings and the practical challenges of implementation.

From a theoretical point of view, grounded in feminist institutionalist theory, institutional change towards gender equality in academia can be conceptualised as an incremental process driven by the bounded agency

of change agents and shaped by the dynamic interplay between agency (in its transformative and resistant forms) and institutional structures. This process seeks to transform both formal and informal institutional rules underpinning the dual logic of academia—the organisational and the epistemic—by challenging established gendered power dynamics to gradually reshape the status quo over the long term.

From a practice-oriented perspective, institutional change towards gender equality in academic settings can be understood as a strategic and ongoing process of transforming the very "fabric" of institutions, ultimately leading to substantial changes in their structures, rules, logics, and culture through an intersectional lens. These processes must be at the core of institutional priorities, engaging stakeholders at all institutional layers and addressing inequalities across multiple strategic areas, thereby fixing both organisational features *and* the knowledge production logics. Change-oriented interventions should concomitantly contribute to short-, medium-, and long-term goals, ensuring that they are context-sensitive to meet institutional needs while also remaining aligned with broader feminist strategic objectives. Finally, institutional change strategies must be designed to sustain transformative progress, ensuring that reforms are durable, integrated into the institution's long-term vision and practices, and capable of influencing the broader academic system.

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The authors declare no conflict of interest.

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