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# Policy-making and evaluation of gender equality programmes: Context, power, and resistance in the transformation process

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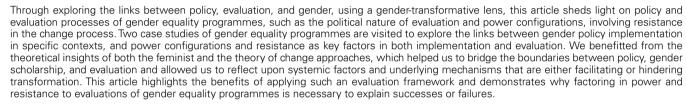
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#### **Abstract**

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Key words: policy-making; evaluation; feminist; gender-transformative approach; gender equality programmes; theory of change; power; resistance.

#### 1. Introduction

In recent decades, expectations for evidence-based policies and reliable evaluations in the public sector in Europe and around the world are on the rise (de Rijcke et al. 2016; Franssen and Hammarfelt 2016; Hansen and Vedung 2010; Jacobsson et al. 2019; Reale et al. 2014). There is, hence, not only an increase in the numbers of evaluations in general, but also an expansion of evaluations of public policy interventions, as these become embedded and institutionalised across organisations and national settings. This is accompanied by a proliferation of different types of evaluations, a combination of different methodologies, and reflections on the best ways to compout and act upon evaluations (Donaldson and Lipsey 200 The Europe, Australia, and the USA, in particular, there are a great number of gender equality policies within research and innovation and thus subsequently increased attention on their evidence-based interventions and evaluations. Bringing insights from key research onto policy interventions promoting gender equality into evaluations may be a fruitful strategy that capitalises on recent developments in policy and social sciences, while also taps into the increasing diversification of different evaluation approaches. This article aims to highlight the benefits of taking this approach for capturing the nuances in explanations for why interventions either succeed

The under-representation of full-time women faculty in research and innovation is a critical concern for research organisations, funding agencies, and policymakers all over the world (Zippel and Marx Ferree 2018). As a consequence, a whole range of interventions have been developed to tackle gender inequalities in research and innovation, spanning national-level funding programmes (such as the ADVANCE programme developed by the National Science Foundation in the USA, the FEMtech Career and Research programmes in Austria, and the Female Professors Programme in Germany) to institutional-level interventions. The European Commission has, for example, funded through the seventh framework programme and Horizon 2020 a range of institutional change interventions—where institutional partners from throughout Europe work together to share knowledge and experiences of structural change through the implementation of gender equality plans (Palmén and Schmidt 2019

Despite a wide range of policies promoting gender equality, trustworthy evaluations of these types of interventions that demonstrate concrete mid-term and long-term impacts are scarce (Caprile 2012; Kalpazidou Schmidt and Cacace 2017). Similarly, recent research reveals the complexity of such evaluations and the challenges of attributing direct impact to concrete programmes and interventions (Kalpazidou Schmidt and Cacace 2018; Kalpazidou Schmidt and Graversen 2020). Mazur and Engeli (2020) point out how identification of causality in long-term change is challenging, and there is a need to acknowledge the complexity of implementation for successful gender equality policy outcomes. Thus, it is increasingly recognised that contextual and structural factors need to be foregrounded in the research of these policy interventions as well as evaluations of these types of interventions as knowledge and insights are highly contextualised

(Kalpazidou Schmidt and Graversen 2020; Karlsson Vestman and Conner 2006).

Feminist scholars and evaluators (Brisolara et al. 2014; Seigart and Brisolara 2002a) have developed a useful body of knowledge, which explicitly factors in politicised contexts, power, and resistance into evaluations. This can be built upon and may be useful in explaining the outcomes and impacts of policy interventions, particularly in the field of gender equality. However, the majority of publications on gender equality evaluations come from the general evaluation literature, while feminist contributions are limited but are increasingly common (Espinosa 2013; Seigart and Brisolara 2002a). Thus, while feminist evaluation literature remains scarce, there is a growing interest in evaluation amongst gender scholars (Brisolara et al. 2014; Bustelo 2017; Espinosa 2013; Hay et al. 2012; Podems 2010; Seigart and Brisolara 2002a). This is also due to both scholars' and practitioners' attention and reflections on an increasing number of gender equality programmes in research and innovation (Buzzon et al. 2016; Drew and Bencivenga 2017).

The main objectives of the article are to (1) unpick the conceptual basis of different types of gender evaluations to understand the broader implications of these different approaches; (2) highlight the benefits of taking gender-transformative, feminist, and theory-driven approaches in evaluation and policy-making through demonstrating their application in two empirical case studies; and (3) demonstrate how factoring power and resistance to evaluations of gender equality programmes is necessary to explain successes or failures.

We discuss the feminist, gender-transformative approach with a specific focus on insights gained in policy studies (Lombardo et al. 2013) and, in particular, experiences of the evaluation of change processes carried out in the policy sector of public research and innovation. This article centres on how the feminist approach brings the contextual issues and the political nature of evaluation to the forefront of policy and evaluation.

#### 2. Conceptual framework

Despite the increasing demands for the evaluation of policy interventions and some attention to gender issues in evaluation, the link between gender policy and evaluation has only recently been developed. In particular, feminist approaches to evaluation have been sporadic with the exception of some interdisciplinary studies (Bus to 2003, 2017; Bustelo and Verloo 2009). Gender-focused and gender-sensitive evaluation was initiated in the 1990s in fields linked to international development and aid. These types of evaluation examined interventions aimed at promoting equality in development programmes, carried out mainly by professionals and practitioners. It gained a greater recognition due to the Beijing Conference (1995) where the need for a cross-cutting, genderfocused evaluation of development programmes was recognised for the first time (Espinosa 2011). Since then, different approaches to gender and evaluation have evolved, which revolve around varying notions of power and transformation, i.e. accepting or challenging traditional gender roles.

Below, we introduce the different types of gender evaluations and continue by further elaborating on the feminist, gender-transformative evaluations, emphasising the need for contextualisation and deeper understanding of the systemic and structural nature of gender inequalities in politicised contexts. Power structures and asymmetrical power relations need to be identified in a critical and reflexive manner that enables a shift of the configuration of power. Evaluation has hence to consider politicised contexts and power relations from the outset in order to challenge traditional roles, empowering marginalised genders. These concepts, central to feminist evaluation, are important in informing both evaluation and policy, as they help assess the extent of power transformation.

Murthy (2018) distinguishes between different types of gender evaluations, i.e. gender-blind, gender-instrumental, gender-specific, and gender-transformative evaluation. This is a valuable approach as it makes explicit how underlying assumptions can be reflected in the explicit objectives of evaluations with implications for the findings of evaluations. In the case of gender-blind evaluation for instance, evaluations are not concerned with assessing changes in gender relations but are more focused on assessing the efficiency and effectiveness of programmes. According to Murthy (2018), evaluations that claim to integrate a gender dimension may disaggregate data by sex, include women in the evaluation teams, and refer to both women and men in the conclusions and recommendations, regardless of the purpose of evaluations. Gender-sensitive evaluation, however, is not always transformative. For example, gender-instrumental evaluation can include gender analysis, but this may be to ascertain the extent to which the programme was able to tap into the traditional roles of men and women in order to achieve programme objectives. Evaluations along this line tend to reinforce traditional gender roles and fail to examine whether gender-specific needs have been fulfilled or how gender relations are transformed. Gender- and sex-specific evaluations analyse the extent to which the programmes address sexand gender-specific needs of women and men but do not aim to examine the extent to which gender relations have been changed. Gender-transformative evaluations or feminist evaluations, in contrast, assess the extent to which the programme has contributed to shifting the configuration of power relations within organisations based on gender and other identities (Murthy 2018).

Feminist evaluation<sup>2</sup> focuses on the structural causes of inequalities between the genders and the differential implications for the different genders and is thus transformative (Espinosa 2013). While like all evaluations, feminist evaluation is about ascertaining the value, merit, or worth of an evaluand, particular attention is paid here 'to gender issues, the needs of women, and the promotion of change', taking a critical and gender-focused view on evaluations (Seigart 2005: 155). Evaluation from a feminist perspective is hence an evaluation that has a structural understanding of gender inequality (Podems 2010). The fact that gender '... inequalities are structural and systemic, as well as dynamic, they should be constantly identified and critically scrutinized and explored. Feminist evaluation is therefore needed to apply a critical and reflective view of a world that still remains androcentric, with certain power structures' (Bustelo 2017: 96).

Accordingly, as a concept, feminist evaluation focuses on the systemic nature of inequalities and on demands for social justice and empowering of people to increasingly involve in society (Bustelo 2011; Espin 2011; Sielbeck-Bowen et al. 2002). Sielbeck-Bowen et al. (2002) state that 'feminist

evaluation implies a world-view, an understanding of reality, and a way of interacting in the world' (in Seigart and Brisolara 2002a: 112). Or as Patton (2008) puts it, feminist evaluation emphasises participatory, empowering, and social justice agendas. Bustelo (2017) summarises the four points of attention central to any evaluation from a gender perspective: (1) the political nature of evaluation, (2) the relation of evaluation to the public interest, (3) the importance of involving the stakeholders, and (4) the need for diversity in methodology to address the increasingly complex evaluation practice.

Summarising the key tenets of feminist evaluation, Seigart and Brisolara (2002a) state in their seminal contribution that (1) gender inequality is systemic and structural; (2) evaluation is a political activity (the contexts in which evaluation operates are politicised, and the personal experiences, perspectives, and characteristics evaluators bring to evaluations lead to a particular political stance); (3) knowledge is a powerful resource that should be of and for the people who create, hold, and share it; and (4) knowledge is filtered through the knower and is culturally, socially, and temporarily contingent. According to Brisolara et al. (2014: 23), 'Each principle is related to a vision of the nature of knowledge, the nature of social reality and inquiry, and the nature of social justice and knowledge creation. To conduct a feminist evaluation means to integrate a response to these concepts within one's work.' These tenets also serve as a general guide to methodological orientation and other decisions made in connection with feminist policy evaluation.

#### 2.1 Politicised contexts

It is widely acknowledged that evaluators need to be attentive to context to understand the conditions shaping situations, actors, and relationships. Contextualisation prerequisites describing the structural and cultural issues—and power relations—and recognising that these relations might shed light on the dynamics that influence policy interventions and their outcome and impact (Brisolara et al. 2014). The feminist approach emphasises that the contexts in which evaluations operate are politicised (Palumbo 1987). The evaluation itself is seen as a political activity since the types of evaluations selected, the partnerships established, the key questions pursued, and the knowledge produced and communicated, as well as the interplay between evaluation and decision-making, are all political in their nature (Chelimnsky 1987; Seigart and Brisolara 2002a; Taylor and Balloch 2006; Weiss 1983). The understanding of evaluation as a political activity<sup>3</sup> implies that evaluators' personal features, experiences, interests, and perspectives come from and are expressions of a particular political stance, which they bring to the evaluation (Brisolara et al. 2014; Podems 2010).

The politicised *context* (i.e. of a programme, institution, organisation, and country) in which evaluators operate is characterised by asymmetrical power relations that influence, for example, which programmes are funded, who makes decisions about policy interventions, their range, and scope, as well as the implementation and impact of interventions (Brisolara et al. 2014). For that reason, according to the feminist approach, evaluation has to consider power relations from the outset (Bustelo 2011; Seigart and Brisolara 2002a).

#### 2.2 Power and resistance

Since feminist approaches understand institutions as sites of power relations—and battlegrounds in which 'opposing principles, interests, values, norms and objectives are overtly or covertly articulated' (Mergaert and Lombardo 2014: 5)—institutions and organisations are seen as reproducing or counteracting gender inequalities (Kantola and Dahl 2005; Kenny and Mackay 2009). The structural nature of gender inequality and overcoming persistent power asymmetries effective in organisational and political contexts is central to feminist approaches stelo 2017; Podems 2018). Power and norms enable or facilitate certain behaviours and may obstruct or support gender equality programmes (Kenny 2011). Feminist approaches in evaluation thus pay specific attention to cultural norms and dynamics, acknowledging the inequalities in opportunities, resources, and power, which are organised by gender and are persistent through time (Brisolara et al. 2014; Bustelo 2017). They challenge norms, practices, and the status quo and therefore generate resistance. Benschop and Verloo (2011: 286) state that 'resistance to change is typically strong when an organization's cultural norms, beliefs, attitudes, and values are the target of change efforts. This is certainly the case with projects that target the gender bias in organizational routines.

Discrimination is systemic and as such embedded in the policies, practices, and structures of institutions (Ackers 2000). It is maintained through social norms that shape institutions, such as research and educational organisations, governmental agencies, and media. The feminist institutionalist<sup>4</sup> scholarship provides insights into power, resistance, and the limits of reforms, pointing to the gendered nature of institutions and the formal and informal mechanisms that underpin institutions and hinder change (Mackay et al. 2010). It demonstrates how gender norms and practices influence the interaction between formal and informal institutions (Cappell and Wayden 2013). Mackay (2011: 181) highlights 'the gendered character of institutions and the gendering effects of institutions', while Connell (2002: 53) emphasises that each institution has a particular 'gender regime', functioning through formal and informal norms, that has gendered implications. This is particularly evident in the male-dominated masculinised research and innovation sector, as well as in the higher education sector (Hearn 2004; O'Connor 2020; O'Connor et al. 2019).

Feminist evaluation is empowering. It requires evaluators to situate themselves within the evaluation process and take action and contribute to political and organisational changes to mitigate disclosed inequalities (Espinosa 2013), recognising that knowledge is valuable not only for the funders but also for the other stakeholders (Hay 2012). Action can take different forms—from dissemination to acknowledgement of findings by stakeholders with power to make decisions and engagement in activities to change the power balance (Brisolara et al. 2014). Institutional norms usually operate protecting existing power relations and resisting change (Longwe 1997). Mazey (2000: 339) asserts that institutions 'constitute important "filters" which may either support or resist policy change'.

Resistance is typically identified among the main actors involved in the context of implementation and evaluation of policy interventions (Mergaert and Lombardo 2014;



nén and Schmidt 2019). Lombardo and Mergaert (2013: 299) define resistance as efforts to 'maintaining the status quo and opposing change'. Mergaert and Lombardo (2014) present a typology of opposition and discuss four types of resistance, i.e. individual (opposition of an individual), institutional (systematic and collectively orchestrated opposition), explicit (expressed through actions and discourse), and implicit (manifested as distancing from stated objectives). Considering power asymmetries in an evaluation helps make resistance visible, identifies the key dominant groups and resisting actors and the mechanisms triggering resistance, and suggests solutions to empower the less privileged actors. Accordingly, a feminist evaluation approach supports an active role for the evaluators in overcoming power asymmetries (Marra 2015; Podems 2018).

#### 2.3 A reflexive approach

Another distinguishing characteristic of the feminist approach brings up the notion of reflexivity. Prügl (2016: 36) states that "'Reflexivity" is a term with many meanings, variously associated with the current phase of modernity (Beck 1992), social constructivism, post-positivist methodology, and emancipatory ethics.' Reflexivity involves critical self-reflection as an integral part of the change process (Alvesson and Willmott 2011). Since evaluators bring into the process their experiences and perspectives, reflexivity, i.e. 'an evaluator's ability to understand her or his own position' in the process, is a key element in the evaluation (Podems 2010: 5; see also Hood and Cassaro 2002; Oleson 2002; Truman 2002), while recognising privilege is a fundamental part of the reflexive process (Fremlová and McGarry 2020). Reflexivity is connected to every aspect of the evaluation design, including also the ability of the evaluator to make sure that power is shared with the evaluated people in the context of the intervention (Patton 2008).

As to the policy-making process, Prügl (2016: 36) points out how actors should 'interrogate their representations of problems in a reflexive manner, so they become aware of unexamined assumptions, silences in the way problems are framed, and potentially deleterious effects resulting from such assumptions and framings'. Reflexivity in the policy process refers thus to rules and practices that provide incentives for actors to question routines, established procedures, and assumptions to overcome hindering factors (Moldaschl 2010). This becomes all the more important in evaluations as it can provide crucial insights into why some policies succeed while others fail.

In the following sections, we discuss how taking a theory-driven, feminist approach to policy and evaluation, especially in connection with transformational interventions for gender equality in research and innovation, has proved a fruit-ful strategy for gaining insights into policy implementation. Acknowledging contextual conditions, power, and resistance as key factors in both policy implementation and evaluation and opening the 'black box' of implementation allowed us to provide critical insights into facilitating and hindering factors in policy implementation. Using this framework—and acknowledging the organisational and systemic patterns at play—we discuss below two gender equality programmes in research and innovation carried out in two different national contexts.

# 3. Case studies of gender equality policies in research and innovation using a feminist, gender-transformative approach

The case study work aimed at building up the evidence base of why, or why not, a policy with a specific set of objectives, scope, targeted sector, etc. operating in a particular context was successful (or less successful) by examining context, power, and resistance. We aimed to pinpoint enablers and those specific sites of resistance that were empirically identified throughout our case study work. An overall evaluation template was developed to ensure that case study data gathering was consistent (see Supplementary additional file 3).

The empirical data of the research presented herewith are drawn from two case studies of countrywide gender equality programmes carried out in Denmark and Sweden. The approach used in the case study work focused on the mechanisms, which facilitated or obstructed the transformational process. The data collection process was based on a combination of comprehensive documentary analysis and interviews with stakeholders involved in the design, implementation, and evaluation of the programmes. Each case study encompassed analyses of policy and programme documents, existing monitoring and evaluation reports, and 8-12 semi-structured interviews with policymakers (initiators of the programmes), programme managers (leading the implementation process), practitioners (implementing the programmes), and beneficiaries (female researchers participating in the programme), lasting between 45 and 60 min. Finally, a narrative report was produced based on the above-mentioned evaluation template developed to ensure data collection consistency. Based on the template, the questionnaire guiding the semi-structured interviews was developed, collecting information on the contextual factors, concept and implementation analysis, and assessment of outcomes and impact. The template enabled us to build a logic model and a theory of change for each case study (see Supplementary additional files 1 and 2) covering context, design and concept analysis, implementation, and impact assessment (Vogel 2012). As a next step, each theory of change was validated with the responsible programme managers. The NVivo programme was utilised to systematically analvse and categorise the results by themes, identifying explicit and implicit enablers and hindering factors. The use of mainly qualitative methods allowed for 'a more in-depth examination of social processes, social relations, power dynamics and the "quality" of gender equality, all of which are difficult to measure with quantitative methods' (Moser 2007: 11).

The link between policy, the political nature of programmes, contextual factors, power configurations and resistances, and how the evaluation theoretical background is used for the analysis has hence been made more explicit by the use of a logic model and the development of a theory of change for each of the cases. The logic model and theory of change illustrate how the key tents of the research are assembled by presenting the guiding questions, the studied dimensions, the contextual issues, and the involved actors, as well as assumptions about the expected output, outcome, and impact, which were validated with the responsible programme managers.

The use of a theory-driven evaluation approach is in contrast to the black-box approach that focuses mainly on



the outcomes and impact of a programme and not the implementation. Information and data about implementation are important for the stakeholders as they enable them to improve existing or future programmes. Our approach is also in contrast to the method-driven evaluation, which is atheoretical in nature and has a tendency to ignore the views and concerns of stakeholders (Chen 2012; White 2009). Theory-driven approaches map the linkages between interventions, context, outcomes, and impact in complex interventions by testing logic models (Douglas et al. 2010). They go beyond causality to explore if the programme works, in which context, how, and for whom, involving all the stakeholders. Stakeholders' implicit assumptions about the design and implementation and the links between policy interventions and impacts are made explicit to shed light on the mechanisms producing change through a theory of change Teuw 2012; Van Belle et al. 2010).

Thus, by using a theory-driven feminist approach, we made stakeholders' assumptions about achieving gender equality objectives explicit. The assumptions address the design, contextual factors, implementation issues, and processes that are expected to happen to achieve programme objectives. The theory of change approach we have used illustrates how the transformation process has been implemented and information from the change model may be used to improve the design and implementation of the programme. This framework provided insights into how to design an evaluation, to produce relevant information about contextual and other dynamics that may lead to successful outcomes and impacts, or to programme failure.

In order to avoid limiting the evaluation potential, and despite the fact that in some cases it was challenging to identify, for example, the practitioners or beneficiaries of the programmes, rigorous efforts were made to involve all the stakeholders in the evaluation process. Accounting for the political nature of evaluation, openness to different voices and perspectives was hence practised (Bustelo 2017). At the same time, based on the acknowledgement that evaluators are not value-neutral, evaluators' beliefs about knowledge, own commitments, and active involvement were made explicit from the beginning in the process.

In addition, a reflexive approach was used to mitigate the risks related to traditional practices, which usually dominate evaluative processes, such as considering only the views of programme initiators (Arkesteijn et al. 2015). Instead, the views of all the stakeholders were the focal point. This did, however, not mean that the knowledge produced was not considered as a powerful tool to take responsibility for the evaluators, disseminating and sharing the results (Bustelo 2017). On the contrary, the produced knowledge was articulated and, in accordance with the feminist tenets, its actual (gendersensitive) communication and utilisation to empower female researchers in the public interest was promoted (Espinosa 2013).

Table 1 presents a typology of the case studies as regards the scope, objectives, type of intervention, and targeted sector and group.

In the following section, we provide a brief description of the programmes, the contextual conditions, the enablers, and the resistances encountered, as well as a reflection on the implementation and outcomes of the two programmes.

**Table 1.** A typology of the case studies.

	Case Study 1 YDUN	Case Study 2 VINNMER
Scope	National—better use of all the potential in Danish research by strengthening talent development	National—provision of opportunities for women's leadership qualification to increase the future pool of qualified leaders in the Swedish national innovation system
Main objective	More balanced gender composition in Danish academia—funding of female research leaders	International mobil- ity of women in research fields of strategic importance to Sweden
Targeted sector	Higher education institutions	Universities/colleges, research institutes and centres, and companies
Type of intervention	DFF—the Danish Inde- pendent Research Council funding programme	Vinnova, the Swedish Innovation Agency funding programme
Target group	Younger female researchers in academia	Women researchers with a strong focus on gender imbal- ances in leadership positions

# 3.1 Case Study 1. A female research leaders' funding programme in Denmark

#### 3.1.1 Context

While the percentage of women with tertiary education in Denmark is higher than the percentage of men, and almost 50 per cent of all PhD students are women, the share of female full professors is very low, namely, 23 per cent. The share of associate professors is also low, but not as low as the full professors, i.e. 33 per cent (Danish Ministry of Higher Education and Science 2020). Aiming at improving the gender balance in research, the Danish Independent Research Council (DFF) initiated in 2013 the one-off funding programme 'Younger women Devoted to a UNiversity career' (YDUN). The programme was enacted by the parliament (which provided additional funding) against the will of the government. It consisted of a 4-year research grant allocated to younger female researchers holding a PhD degree.

The main objective of the programme was to make better use of all the potential in Danish research by strengthening talent development, increasing the share of female research leaders, and promoting a more balanced gender composition in Danish academia. In order to achieve these objectives, DFF allocated 110 million DKK (app. 14.8 million EUR) to the programme in 2013–4. YDUN was open to applicants from all scientific fields, and both men and women could apply for the grants. However, in the case of applicants with equal qualifications, women would be favoured (DFF, 2013–4).

Grants to promote better balanced gender composition in Danish academia through funding of female research leaders have been scarce in Denmark. The call therefore resulted



in a high number of applicants (527 women and twenty-six men applied for the YDUN funding). The high number of applicants also meant that the applications for funding by far exceeded the budget, resulting in a low success rate of only 3 per cent compared to the success rate of the regular DFF programmes that usually is well-above 10 per cent.

#### 3.1.2 Outcomes and impacts

The programme succeeded in empowering women by boosting the career of seventeen female researchers as the grant benefitted their research, publication rate, and thus academic career. In addition, the programme succeeded in attracting more women, in particular, younger women researchers to apply for larger grants (34 per cent of the researchers who applied for the programme had never applied for DFF funding before). This trend also continued in the following, regular funding programmes of DFF, with an increase in the numbers of female researchers applying for funds. Thus, looking into the broader impacts of the programme, for the non-funded applicants, an immediate impact was noticed in terms of higher reapplication rates for the subsequent regular DFF research funding programmes. Fifty-two per cent of the women who applied for YDUN grants reapplied for other DFF funding during the following call for applications, where the percentage of the total female applicants for DFF grants was 6 per cent points higher than the average for the period 2009-4, i.e. the funding period prior to the launch of YDUN (Kalpazidou Schmidt et al. 2018a).

#### 3.1.3 Power, enablers, and resistance

The fact that the programme was initiated by the DFF and had a relatively large budget enabled the successful mobilisation of female researchers and implementation of the programme. Another important enabler was the framing of the programme as a policy initiative contributing to Denmark's ambition to remain a worldwide research and innovation leader. Furthermore, the openness of the programme to all genders was a facilitating factor in the implementation process although there were strong (male) voices in opposition to the programme as it mainly targeted women researchers and no male researcher was funded by the programme.

Discrimination on the basis of gender (as well as sexuality, race, religion, etc.) is prohibited by law in Denmark (The Act on Equal Treatment, the Act on Equal Pay for Men and Women, and the Act on Entitlement to Leave and Benefits in the Event of Childbirth). The law provides the possibility to introduce affirmative actions to enhance gender equality in academia. However, this requires a dispensation from the Act on Equal Treatment. One of the main implementation obstacles with YDUN was thus the legislative framework since a dispensation from the law was required to implement an affirmative action favouring women researchers over men, in the case of equal qualifications. In addition, the fact that the programme was passed by the parliament against the will of the government affected public opinion, while the rhetoric in the public debate about initiating a programme favouring women researchers was detrimental and at times harsh.

For a long time, the common perception in Denmark has been that discrimination on the basis of gender is not present in the Danish society, since there are laws ensuring equal treatment. The existence of structural and cultural gender discrimination, institutional sexism, etc. has largely been denied

and has until very recently been a contentious issue in the public debate. In this context, structural factors and cultural biases in academia have been overlooked or neglected. Intensive discussions about the legitimacy of policies targeting female researchers, like the YDUN programme, have therefore taken place in the public debate (Kalpazidou Schmidt et al. 2018b). Thus, the YDUN programme caused outrage and controversies in the public debate with strong resistance and backlash. The resistance towards the programme came not only from both the media and politicians but also from parts of academia. Some strong (male) voices within academia expressed their clear opposition to the programme, which was accused of discriminating against men and was reported to the responsible ministry and the Tribunal for Equal Treatment as working against equal opportunities. However, complaints in both instances were dismissed, since the law provides the possibility to initiate affirmative actions for the under-represented

The strong criticism of the programme had a direct detrimental impact on the recipients of the grants. Some of the researchers, who were critically approached by the media, felt stigmatised and under pressure to justify their funding, while others were overwhelmed by the constant interest of the media on the issue and the persistent annoying efforts to get statements about the 'discriminatory nature' of the programme and its 'lack of legitimacy'.

Finally, the opposition that the initiators of the programme and the implementation actors (policymakers, programme managers, etc.) met may also provide some explanation for the silence that followed the implementation, outcomes, and impacts of the programme. Due to the harmful debate and strong resistance towards the programme, the initiators expressed their reluctance to continue to use this type of policy instrumentation to promote women in Danish research. Policymakers and practitioners stated in interviews that the unexpected resistance meant that similar future initiatives were put on hold.

# 3.2 Case Study 2. An international women's leadership mobility programme in Sweden

#### 3.2.1 Context

In Sweden, the share of female students is higher than the share of male students, namely, 57 per cent, while the share of female PhD students is 46 per cent. Sweden managed to maintain a relatively equal share of men and women throughout the academic ladder, up until the level of full professor. Thus, 46 per cent of the staff at the level of associate professor are women, while the share of female full professors is low, i.e. 25 per cent. The aim of the VINNMER programme was therefore to provide opportunities for women to qualify as research leaders through increased national (e.g. university-private sector research collaboration) and international mobility in research fields of strategic importance to Sweden. The programme targeted exclusively women researchers and had a strong focus on gender imbalances in leadership positions. It funded research mobility for women doctoral researchers in order to increase the future pool of qualified leaders in the national innovation system, thus addressing the problem of the low numbers of qualified female research leaders (Cecchini et al. 2018).

The Swedish Innovation Agency, Vinnova, the funding and implementing body of the programme, has prioritised the

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promotion of gender equality since its establishment in 2001. Through the VINNMER programme, the agency covered half of the salary of the funded female researchers. The Swedish research institution, where the researchers were affiliated, or the host organisations were expected to cover the remaining half of the salary of the researchers. VINNMER ran over an 8-year period (2007–14) and had a total budget (including the financing by receiving institutions) of just over 600 million O22 SEK (€60 million) (Cecchini et al. 2018).

Promoting gender equality is a high-priority objective in Sweden. Policies are characterised by an approach to gender equality, which well exceeds the requirements of European legislation and goes well beyond what is practised among other international gender equality leaders (Numhauser-Henning 2015). Moreover, gender equality is perceived as an important value and aim in itself in democracies, where the participation of all genders—and not only some parts of the population—in society is evident. As a consequence, gender equality interventions do not need to be legitimised as a means to achieve other targets, such as improved economic conditions, as is the case in some other countries. The main strategy for change is gender mainstreaming, and various governmental agencies and bodies serve as supporting actors in the implementation of mainstreaming activities at Swedish research institutions and in society in general.

#### 3.2.2 Outcomes and impacts

In total, 151 researchers received mobility grants in the period 2007-14. Ninety-one researchers travelled abroad, while sixty grants were used to increase national mobility through incoming mobility or through academia-industry mobility. As expected, the outcome of VINNMER in terms of gender equality has been the strengthening of women's research and leadership competences, and reinforcement of international and national networking and collaboration. The programme has been successful in increasing the visibility of women with leadership potential and not least the number of women in research and managerial leadership positions. As regards the impact of VINNMER overall, longer research stays abroad benefitted both home and host research institutions by enhancing cooperation and knowledge sharing, while academia-industry collaboration transferred knowledge between the two sectors, increased awareness on gender issues in industry, and empowered women to attain leadership positions (Cecchini et al. 2018; Jöns 2011).

#### 3.2.3 Power, enablers, and resistance

All in all, the programme worked as intended, facilitated by the contextual factors in a country where 'state feminism' is the main approach and gender mainstreaming the key strategy pursued. The issue of female researchers' under-representation in top research positions in all sectors is well acknowledged by all sectors in society. Gender equality in higher education, research, and innovation has been on the political agenda since the beginning of the 1990s, and the problem of female researchers' under-representation in top research positions is well acknowledged by all political parties and shifting Swedish governments.

Moreover, in Sweden, because gender equality issues are considered as important social justice and democratic issues, they have been prioritised in the political agenda and promoted through targeted legislation. Sweden has developed a wide-ranging, top-down gender equality policy covering all sectors, with legislative stipulations and specific initiatives to challenge structural and cultural discrimination in research and innovation. The specific gender equality stipulations are incorporated in the Higher Education Acts. The Swedish framework also provides opportunities to sanction institutions, which do not live up to obligations in promoting gender equality (Nielsen 2014). In addition, numerous Swedish governments have established nationwide committees with the aim to raise public awareness on the importance of promoting gender equality (Kalpazidou Schmidt 2019).

State feminism and top-down approaches as those implemented in Sweden prerequisite buy-in to be efficient. In particular, bottom-up buy-in from programme managers and researchers and clear strategic goals are essential for mobilising potential participants (Palmén and Schmidt 2017). The programme was exclusively for women researchers and had a strong focus on gender. Some of the obstacles to the programme were manifested in connection with the VINNMER follow-up, i.e. the Mobility for Growth programme, which in order to comply with European Commission regulations, as it was co-funded by the Marie Currie<sup>5</sup> actions, could not anymore be characterised as an affirmative intervention for women only, but targeted all genders. The interviews with policymakers and practitioners suggest that this change constituted an obstacle to the implementation of the programme, making it less attractive. The vague strategic goal of the programme made the branding of it more difficult and resulted in a decrease in the number of applicants and problems in using the resources.

In 2013, the government initiated the programme Gender Mainstreaming in Government Agencies to support the participating agencies in their gender mainstreaming work, contributing to the achievement of the national gender equality objectives (among others equal distribution of power and influence). More than sixty governmental agencies are involved in the programme, which are assisted by the Swedish Secretariat for Gender Research (Kalpazidou Schmidt 2019). However, gender mainstreaming, a structural change strategy, has been criticised for deficiencies in economic, political, and managerial support to achieve transformation and for risking an evaporation of gender in the implementation process. Gender mainstreaming has also been criticised for the lack of a robust methodology (McGauran 2009) and for the discrepancy of organisational practices and procedures that might prevent gender mainstreaming to attain its objectives (Eveline et al. 2009). When the follow-up Swedish programme broadened its scope, including all genders, the result was a fading out of gender and declining in interest to participate in the programme.

Finally, a hindering condition was identified in the fact that the programme was designed to provide half of the salary and cover additional costs for the researcher and any accompanying family (travel, higher accommodation costs, etc.), but the host (often a prominent international) environment should contribute the remainder of the salary as co-financing. This rigid structure excluded women in the early career stage who had not established networks and thus had difficulties to obtain co-funding to participate in the programme, or women

who albeit established international collaborations had no co-funding.

#### 4. Discussion

We set the framework and discussed the links between policy-making and feminist research and evaluation by focusing on the political nature of evaluation and elaborating on the interactions between politicised context, enablers, and resistance in the two cases. The analysis revealed that these interactions are dependent on the characteristics of the two contexts in which the specific programmes are implemented and on the features of the programmes themselves. Looking into the interconnections, they enabled us to identify the factors that are activated within each case context. This process helped to foster understanding of the barriers and facilitators to the implementation of the programmes.

Addressing power and resistance in connection with the implementation of the two gender equality programmes, policymakers, researchers, and evaluators need to pay attention to values, norms and practices, the actors involved, and contextual dynamics, as well as the interrelations between these. Power configurations and resistances in the design and implementation of gender equality programmes in research and innovation may manifest in various ways. Danish policymakers needed, for instance, to anticipate the type of resistance involved in the specific Danish context, individual or institutional, explicit or implicit, formal and informal, and expressed as gender-specific. However, the distinction between institutional and individual resistance is not straightforward, for example, when powerful, high-ranking individual voices from Danish institutions express their opposition to gender equality initiatives, these may result in maintaining the status quo (see Lombardo and Mergaert 2013).

Throughout the case studies, different types of resistances and their underlying informal gendered rules have been identified, including—as in the Danish case—an opposition to financial incentives aiming to boosting the careers of female researchers. A typical example of a mixture of individual and institutional resistance, but also gender-specific resistance, was hence the attempts of some high-ranking individuals from parts of academia and the media in Denmark, denying the need for gender change through policy interventions, to control the political agenda by presenting the programme as discriminatory to men and a violation of the existing legislation. The resistance was explicitly manifested based on claims about programmes targeted funding of female researchers as going against national non-discrimination legislation. The Danish case demonstrates how discourses matter in the design and implementation of policies on gender. The actors involved in the Danish discursive policy dynamics resisted the implementation of the programme and constructed new framings of the problem of gender inequality in research and its solutions A02 Ciccia and Lombardo 2020). Thus, a power struggle between different actors is noticed during the implementation of the programme with some actors trying to slow down or obstruct the process. The Danish case highlights also the significance of both top-down commitment and bottom-up buy-in, in particular, in connection with gender equality programmes in research and innovation, where strong competition about limited leadership positions may lead to explicit or implicit gender-specific resistance (Palmén and Schmidt 2019)

Moreover, an academic and organisational culture with strong reliance on individual 'meritocracy', as the one in Denmark, creates resistance to any affirmative action aimed at promoting more women in research. Different types of obstacles, i.e. structural, legislative, and cultural, were manifested in connection with the implementation of the Danish programme, exposing how narratives about meritocracy and fairness in competition legitimise gendered effects. Despite a very competitive process, much more competitive than the regular DFF research funding programmes, involving international peer reviews in the allocation of funds, female researchers were asked to justify their YDUN funding. Preferential funding allocation clashed hence with widespread assumptions of 'academic meritocracy' and 'fair competition', resulting in gender equality promoting programme grant takers facing backlash and stigmatisation.

In addition, informal rules, such as institutional or social norms and values, steer developments and may undermine gender equality reforms, when formal rules and legislations are not actively maintained and enforced or are widely interpreted as working against non-discrimination, as seen in the Danish case. Lombardo and Mergaert (2013: 301) identify the causes of resistance to 'lie in the gendered norms deeply rooted in institutions and organisations'.

The Swedish case spanned legally binding measures providing positive incentives. However, as Mazur et al. (2020: 45) show in the French context, 'the power of state feminist structures to challenge the traditional gender order is also limited'. Despite concerted efforts, top-down, path dependency, and the operation of informal gendered rules and practices limit the possibilities for radical change in the Swedish context (see Mackay et al. 2010). In the Danish case, the legal framework was used by some actors as a means to negatively impact the process, undermining the successful implementation of the programme. The strategy of the DFF to gain more acceptance amongst the general public (including men) by enabling all genders to apply for the programme, thereby excluding for women-only interventions, was expected to decrease resistance. However, as the programme was imposed by the parliament and against the will of the government, implicit institutional and organisational resistance has been identified at the highest executive level, i.e. the government. The lack of political consensus about the need for affirmative gender equality actions had a negative impact on the public debate and on how the programme was addressed by the media. In general, there is a political aversion to gender equality interventions in Denmark and the political motivation to initiate gender equality policies in research and innovation lies more in the ambition to remain a worldwide innovation leader rather than in the prioritisation of the issue in the policy agenda as a social justice matter. This is in contrast to the gender equality policy in Sweden where social justice and the democracy argument to include all genders in research and innovation are the main driving force behind the use of gender mainstreaming and targeted gender equality interventions. However, implementing gender mainstreaming is not unproblematic. It has to be followed up by economic, political, and managerial support, adjusting organisational practices, and ensuring bottomup buy-in among researchers in order to achieve transformation. This was manifested in the Swedish case where the successor of the VINNMER programme, targeting all

genders, failed to adjust organisational practices and attain bottom-up buy-in.

In contrast to Swedish policies, inequality in Denmark has mainly been addressed through individual-meritocratic explanations about women's promotion, neglecting and overlooking structural, cultural, and institutional factors, as well as gendered relations. The YDUN programme, framed as a 'talent' development programme, focused on individual researchers and the promotion of individual careers, an approach overlooking the structural and cultural nature of inequality. This set limits to the impact of the programme. As cultural and social structures reproduce inequality, addressing the issue based on an individualised approach has proved not transformative in nature or supportive to achieve the aim of improving the gender balance in academia in general. The issue has been under-prioritised in the Danish research. and innovation agenda and programmes that targeted gender equality at the national level have been scarce, while the few carried out met with resistance.

The YDUN programme successfully supported the careers of those specific individual researchers who were awarded grants and increased the numbers of female applicants in the following DFF call, but its contribution to achieving the intended impact, i.e. strengthening of talent exploitation in Danish research by improving the gender balance among researchers, has been limited, as the problems causing imbalances remain. One-off initiatives are less likely to be transform and in the long run (Kalpazidou Schmidt and Cacace 201 such, the programme failed to address the roots of gender inequality—it was not geared to sufficiently counterbalance the disadvantages of gender inequality in Danish academia. Experiences from such individualised funding programmes reveal that these kinds of policy interventions cannot stand alone in addressing gendered power imbalances. As recent research shows, the closing of the gender gap in academia is a complex issue and requires acknowledging and operationalising complexity as a frame of reference, adopting a structural and cultural approach, which Denmark has only recently embraced as national policy (Kalpazicon Schmidt et al. 2020).

A strategy, often used in Denmark, is to frame gender equality interventions in terms of 'using all the research potential' in the country to enhance national research and the position of Denmark in the international research and innovation competition. The Danish approach means that gender equality is seen not as a matter of promoting female researchers and transforming organisations or institutions to attain gender equality, but as an instrument linked to national economic interests, decoupled from organisational dynamics, and structural and cultural conditions. The evaporation of gender in policy, making women researchers invisible and emphasising the instrumental and economic argument, maintains and reproduces inequality in Denmark. This is mirrored in the gender-instrumental approach in the policy cycle, including evaluation and analysis. In contrast to the feminist approach that aims at women's empowerment, in an instrumental perspective, information and data are used to explore how interventions have used the different roles of genders for the success of set objectives, targeting women as researchers for achieving competitive advantages or maintaining national economic advantages, as is the case in the Danish programme. Moreover, gender as a 'smart economics' approach is seldom

gender-transformative, in particular, in the case of summative evaluations, where the focus is on outcomes and not on processes (Murthy 2018). The framework developed by Murthy, and discussed earlier, could be further expanded to include the entire policy cycle, from design to implementation and evaluation, as it has to consider at the outset power relations in public policy seen from a gender lens.

Despite the fact that most literature focuses on the design and implementation of policy in mainstreaming, evaluation is a key component of the concept of mainstreaming (Bustelo 2017). Part of the concept of the mainstreaming approach to gender equality employed in Sweden is thus evaluation. According to the Council of Europe (1998: 12), 'Gender mainstreaming is the (re)organization, improvement, development, and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies at all levels and at all stages, by the actors normally involved in policy making.' While Denmark also formally uses mainstreaming, there are a number of inconsistencies in the existing public policies, such as the way that gender and gender programmes are framed in policies and the lack of recognition of the structural and cultural character of gender equality but also of the need for complex policy interventions to address inequalities, which may reproduce inequalities. As Bustelo (2017: 91) points out, this means that 'if a gender lens is not systematically used throughout the policy-making process, the most probable result is that not only will policies not do anything to overcome gender inequality but they will rather maintain, reproduce, and reinforce it'.

Our analysis also suggests a number of questions that need further elaboration. First, in discussing our framework and results, we made no assumptions about which types of policies or framings of the policy issues are likely to provide a better acknowledgement of the need for interventions and mitigate resistance in specific contexts. However, the insights provided based on the implementation of two gender equality programmes in different contexts can be the basis for further studies on these issues.

Second, an analysis of the importance of gender competence for the successful policy design and implementation of policy is beyond the scope of our paper. Nonetheless, recent research reveals that the existence of such competence and expertise can be seen as a great transformational facilitator, helping to mitigate resistance, while a lack of gender competence may hinder the smooth implementation of interventions.

Third, we discussed policy-making and evaluation and how to further develop the policy-making process through evaluation. One implication of this seems to be the need for analyses of the use of mainstreaming approaches to regender the policy cycle, where evaluation should be included as part of the cycle, further exploring how feminist insights can benefit both policy-making and evaluation processes.

#### 4.1 Implications of the adopted approach

There are a number of constraints to promoting a theory-driven, feminist approach to evaluations, which are linked to programme design and evaluation framework, methodologies used, and evaluation processes that need to be gender-transformative. Resistances may come from long-held assumptions that evaluation and empirical research

should to some degree be 'neutral' and 'objective' in order to best assess the extent to which objectives have been met and real change (as defined by the intervention's objectives, which may or may not be gender-transformative) has occurred. This approach may inadvertently operate from an epistemology that paradoxically frames the intervention on its own terms and thereby may miss some of the key explanatory factors as to the extent to which the intervention has been able to (or not) trigger transformative gender relations and crucially why. A feminist approach to evaluation and research would recognise the importance of assessing the extent to which the intervention has been able to shift real gender relations as transformative, explicitly factoring in context as key, so really strengthening the substantive focus.

Taking a feminist approach to evaluation also strengthens the methodological approach by enabling multiple perspectives to be represented, thereby creating a more nuanced and complex vision of why or why not an intervention has been able to challenge and transform gender relations, as triangulation (of perspectives and methods) becomes integral to the research process.

In addition, the theory of change approach adopted provides not only information on whether the objectives of the studied programmes have been attained but also explanatory information about the conditions and mechanisms for improving the programmes (Chen 1994). In contrast to other approaches, the theory of change helps hence to establish not only whether programmes work in relation to stated objectives but also how they work, pointing out the operating mechanisms. Identification of these mechanisms can support enhancement, replication, and transformation of programmes or parts of programmes to other similar contexts. On the other hand, in case a programme is not effective, this approach enables the establishment of, for example, whether this is due to implementation failure, unsuited mechanisms operating in a specific context (Pawson and Tilley 1997), or theory failure (Rogers 2000; Weiss 1997). These are some of the greatest strengths of the theory of change, which may be a vital instrument for policymakers (Donaldson 2007; Donaldson and Lipsey 2006).

#### 5. Conclusions

To sum up, we discussed the link between policy-making, evaluation, and gender by focusing on the political nature of evaluation, elaborating on the interactions between politicised contexts and resistances. Based on the feminist approach, the article focused on gender imbalances in research and innovation as being systemic and structural. Two case studies of countrywide public policy gender equality interventions in research and innovation in Denmark and Sweden helped illustrate contextual issues, as well as identify those key facilitating conditions and hindering factors.

We made the link between policy, the political nature of programmes, and operating mechanisms more explicitly by developing a theory of change for each case, including the guiding questions, the studied dimensions, the involved actors, and how the evaluation is performed, as well as assumptions about the expected output, outcome, and impact. Thus, by using a feminist, theory-driven evaluation approach, we made explicit the assumptions of the stakeholders about processes that are expected to happen to achieve programme

objectives to shed light on the mechanisms that are producing, facilitating, or hindering change.

The study shows the importance of implementation, policy frames, and formal and informal structures in transformational policy evaluation. Our analysis has drawn attention to the fact that policy evaluation needs to move from being gender-instrumental to being gender-transformative in character to question traditional gender roles and transform gender relations, shifting the configuration of power relations. We made resistance visible by identifying those actors with a strong voice that opposed specific gender equality policies. Identifying resistance at play in case studies implies the acknowledgement that the process of evaluation is part of the efforts to move society towards improved gender equality and hence increased social justice. As public policy evaluation of gender equality policy is an expanding practice of the policy-making process, its review from a feminist perspective is needed if the aim is to pursue more contextualised knowledge, gaining insights into the role of different actors, challenging power, and resistances in the transformation process. This suggests that policymakers, programme initiators, practitioners, and evaluators need to consider at the outset the different actors and their power in public policy interventions.

Our analysis contributes to the existing literature by expanding the knowledge reservoir on theory-driven evaluation and by addressing the scarcity of case examples (Coryn et al. 2011) to explore the implicit factors behind gender equality programmes in specific contexts and their promoting factors and constraining effects during the implementation of policy. We benefitted from the theoretical insights of the feminist approach, which helped to bridge the boundaries between the policy and gender scholarship and evaluation. Developing solid empirically driven research regarding gender equality interventions—as well as carrying out evaluations of such has benefitted greatly from the use of a theory of change approach. The theory of change framework has provided the guiding mechanisms to explain what works, in which context, and why. Our case studies demonstrated the need to factor in context into explanations of why interventions were seen to either be successful or fail. Explicit attention to the contextual issues and operating mechanisms enriched evaluation explanation and made the findings more generalisable. For example, we demonstrated how Sweden has developed a comprehensive, top-down gender equality policy covering all sectors, with legislative stipulations and specific initiatives to challenge structural and cultural discrimination in research and innovation. This context provided the background for the wider acceptance of a gender-transformative intervention. In contrast, the Danish case study, the YDUN programme, was framed as a 'talent' development programme, targeting individual researchers in order to promote individual careers. This approach overlooked the structural and cultural nature of inequality and circumscribed the impact of the programme. As cultural and social structures reproduce inequality, addressing the issue based on an individualised approach did not prove transformative in nature or supportive to achieve the aim of improving the gender balance in academia in general. The feminist evaluation approach helped to provide a solid substantive explanation for the general outcomes of both national programmes while strengthening the methodological approaches by fostering a plurality of perspectives and methods.

This article may be of interest to policymakers, evaluators, gender scholars, and practitioners who seek insights in the area of evaluation from a gender-transformative perspective and may encourage efforts to regender the policy cycle, further exploring how feminist insights and theory-driven approaches can benefit evaluation processes and policy-making.



#### Supplementary data

Supplementary data is available at Science and Public Policy online.

Conflict of interest statement. None declared.

#### **Notes**

- 1. When we use the term 'feminist approach', we refer to 'feminist evaluation' or the 'feminist approach to evaluation'.
- 2. Podems (2010) makes a distinction between feminist and gender approaches but sees them as complementing each other: 'feminist and gender approaches are complementary. For example, gender evaluation and feminist evaluation recognize that "values and knowledge are culturally, socially and temporally contingent" (Sielbeck-Bowen et al. 2002: 6). They also both provide a way to think about women's (and men's) roles and how data relating to these roles should be collected in an evaluation process.' Bustelo (2013), on the other hand, sees this dichotomy between gender approaches and feminist evaluation as an excuse for leaving gender approaches without the feminist principles that give them meaning.
- 3. This debate goes even further with the Blue Marble Approach to Evaluation by connecting diverse local contexts to global issues and trends, see https://bluemarbleeval.org/ and also https://www.utilization-focusedevaluation.org/principles-focused-evaluation.
- For more on feminist institutionalism, see Mackay (2011), Mackay et al. (2010), Mackay and Waylen (2009), and Cappell and Wayden (2013).
- For more on the Marie Curie actions, see https://ec.europa.eu/ research/mariecurieactions/.

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