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KNOWLEDGE INTO  
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35 YEARS

# GENDER EQUALITY PLAN 2022-2024

'PLANO DE IGUALDADE DE GÉNERO'

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# 1. Objectives and Context

This document details the Gender Equality Plan (GEP) of INEGI for the period 2022-2024, which gathers the actions considered essential to further develop and promote equal opportunities and well-being for the women (W) and men (M) composing INEGI's people.

Convinced about the key role of its people to the success of its activity, INEGI's commitment with ensuring the personal and professional development of its persons is clearly embodied in its mission statement and vision, as well as in its Responsibility and Cooperation values<sup>1</sup>. Behaviours reflecting the later are expected to, among others, foster the application of high ethical standards, both within its people and between these and the external partners/customers, in which gender equality (GE) and non-discrimination are included.

The GE right has been given particular attention by the main international entities over the last years, and also in Portugal it became increasingly important, pushing the awareness of organizations and the adoption and implementation of measures to prevent against and fight gender discrimination. The increase in national<sup>2</sup> and European policies<sup>3</sup> related to GE issues has also generated a new perspective regarding the conditions that allow and facilitate the balance between professional activity with family, personal life and work, which are guiding INEGI's GEP here described and with which INEGI is fully committed.

Created as an academy-industry interface entity, INEGI is particularly linked to the Faculty of Engineering of the University of Porto (FEUP), which acts as INEGI's main source of talent. Following the traditional W/M imbalance in the Technology and Engineering activities, INEGI factually hires more men than women, being also in line with the uneven gender distribution within FEUP's students population (academic year 2020/2021: W / M = 32% / 68%<sup>4</sup>). The impact of this fact in the overall INEGI's gender profile and GEP is discussed in the next sections, building on the diagnosis of INEGI's people characteristics, referring to 2020, and on relevant internal measures.

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<sup>1</sup> INEGI Annual Report 2021 (RAC - Relatório de Atividades e Contas 2021).

<sup>2</sup> National policies guiding INEGI's GEP: the Portuguese Republic's Constitution (Article 13), Article 23, and 65 of the Work Code.

<sup>3</sup> European Policies guiding INEGI's GEP: the European Strategy for Gender Equality 2020-2025 (COM(2020) 152 final), European Research Area (COM/2020/628 final).

<sup>4</sup> FEUP in Figures 2020, ([https://sigarra.up.pt/feup/en/WEB\\_BASE.GERA\\_PAGINA?p\\_pagina=31697](https://sigarra.up.pt/feup/en/WEB_BASE.GERA_PAGINA?p_pagina=31697)).

## 2. About INEGI

INEGI is a Research and Technology Organization founded in 1986 as a non-profit private association among FEUP Department of Mechanical Engineering, and has recently incorporated its Department of Metallurgical and Materials Engineering. Recognized as of public utility, INEGI is an active agent in the development and consolidation of a competitive model based on knowledge and on high technological product and process innovation.

INEGI is primarily dedicated to industry-driven activities focused on increasing the competitiveness of the national industry through Research and Development (R&D), Technology Transfer, Consulting Services and Advanced Training, in the fields of engineering design, materials, production technology, energy and environment, and industrial management. It gathers differentiated skills and capacities in these areas, wide experience in the management of collaborative projects with companies, and a clear orientation towards applied technological innovation, at both product-, process- and service-level.

The privileged protocol-covered relationship with the UPORTO (in particular with FEUP Department of Mechanical Engineering and the Department of Metallurgical and Materials Engineering) allows the integration of academics and university students in research and innovation projects with companies. This model has enabled to create, over the years, a broad spectrum and multidisciplinary offer, but at the same time very specialized, from a scientific and technological point of view, covering all the traditional and emerging fields of Mechanical Engineering and Industrial Engineering, responding to various strategies of collective efficiency, particularly in the North region of Portugal.

Finally, it must be noted that most of INEGI's PhD researchers and academic affiliates are integrated in the national-wide R&D Associated Laboratory for Energy, Transports and Aerospace (LAETA), directly funded by the Portuguese Science & Technology Foundation (FCT) and led by INEGI since 2018.

## 3. People Organization & GEP Working Group

### 3.1. People Organization

INEGI's internal personnel is composed by people with different types of contracts and research fellowship holders.<sup>5</sup> Fig. 1 shows the related numbers referring to 2020, corresponding to 316 persons in total.

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<sup>5</sup> For the purpose of this document and of the GEP in focus, the terms 'people', 'fellowship holders', and 'researchers' along the document consider, jointly and equally, women and men among INEGI's people, ensuring a neutral and generic language.

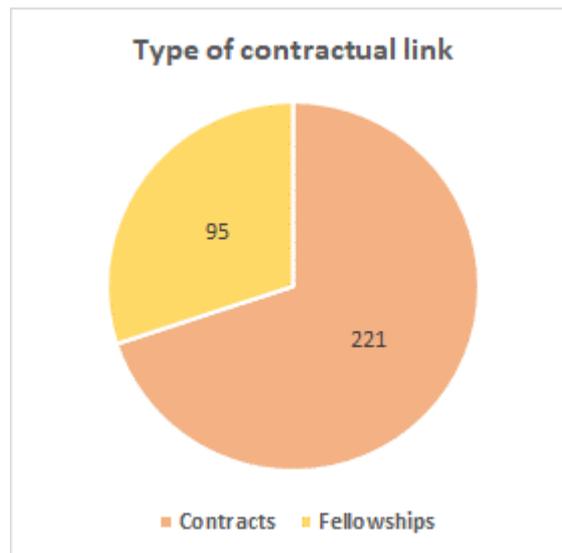


Fig. 1: Composition of INEGI's people, regarding the contractual or affiliation relationship (2020).

The individual positioning and career development of the contracted internal personnel is strategically managed along established Job Groups and Job Functional Families, according to the individual competences and expected role (complexity of the position and level of responsibility), as resumed in Fig. 2.<sup>6</sup> The individual positioning in terms of Job Group and Job Functional Family is translated into a specific wage level, building the ruling wage table.<sup>7</sup>

Job Group	Job Functional Families					
	Project Manager	Researcher	Senior Technician	Professional Technician	Administrative Technician	Management
Director						
Coordinator	Individual Roles					
Principal						
Assistant						

Fig. 2: Main structure of the organization of INEGI's contracted internal personnel.

At the recruitment stage, the suitability of the job applicants' technical characteristics to the position in view is emphasized. Later on, the decision-making process behind the individual career development considers the result of the performance evaluation followed on a yearly basis.<sup>8</sup> Thus, both complementary recruitment and career management processes are only based on meritocracy, as this is considered crucial for the attraction, retention and development of talent, and no gender-related factors apply to these.

<sup>6</sup> INEGI, 'camINHos' – People Management Model, 2022 (last update).

<sup>7</sup> INEGI, 'Tabela Salarial', 2022 (last update)

<sup>8</sup> INEGI, 'Avaliação de desempenho' and 'Notas de apoio', 2013.

Additional statistics about INEGI's internal personnel, particularly regarding its distribution by age and qualification level, are provided in Fig. 3, respectively.

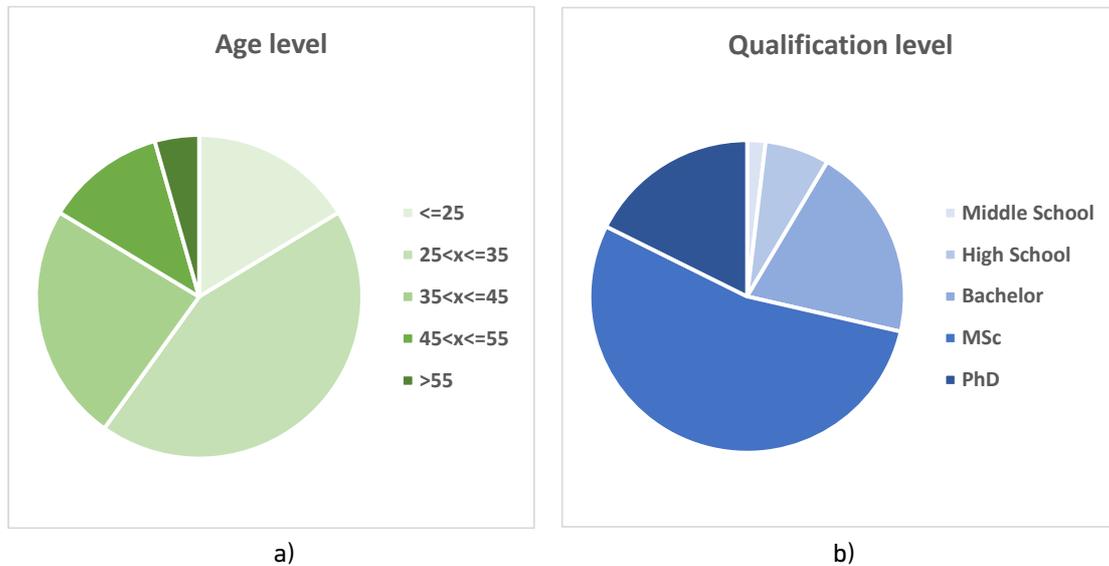


Fig. 3: Distribution of INEGI's internal personnel by a) age level and b) qualification level (2020).

It must be noted that the evaluation panels behind the recruitment processes related to engineering and research activities are, by internal regulation, carried out by the specialists of the Human Resources Services and a scientific jury or a technical committee ensuring that this process incorporate diversified points of view, in order to minimize eventual bias.

### 3.2. GEP Working Group and Methods

The working group formed for the preparation of the current GEP was firstly composed by representatives of INEGI central services, including Human Resources (SRH), Communication & Imaging (SCI), Advanced Training (FA), and Integrated Projects, and the Research Units dealing with specific gender aspects in their activity. Most of these teams have also been involved in recent parallel initiatives and processes directly addressing gender aspects. For the data collection, the core group was supported by the central Information & Systems Services (SIS). The work was led by the SRH, who insured the regular reporting to INEGI's Executive Board. In parallel, this team has followed the preparation of the broader UPORTO GEP, benefiting from the central resources created to support its development.

Templates and guiding documents shared by the UPORTO GEP team, including the GEAR tool,<sup>9</sup> have been used as reference. Data collection and analysis were firstly

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<sup>9</sup> GEAR tool – 'Gender Equality in Academia and Research', <https://eige.europa.eu/gender-mainstreaming/toolkits/gear>

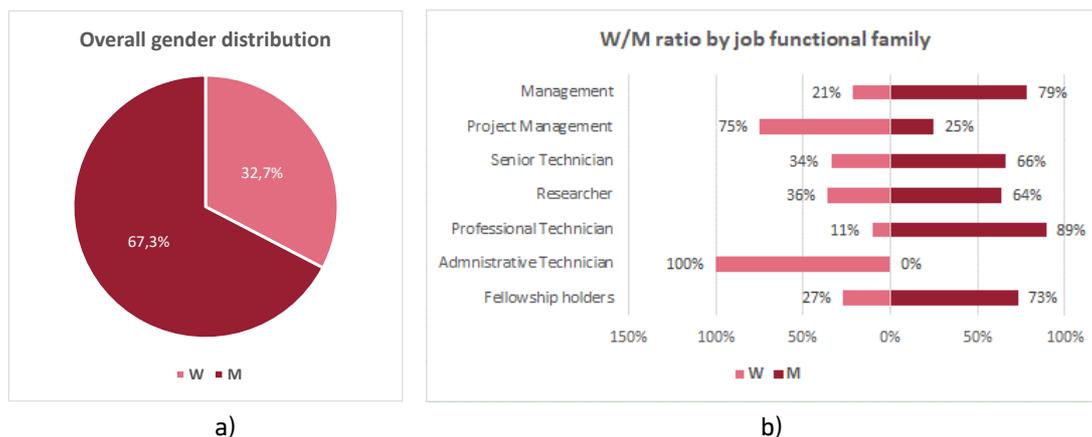
based on data gathered from INEGI's management systems. The need for additional methods and internal procedures enabling to extend and to deepen the analysis in terms of GE-relevant indicators was identified. This triggered some of the actions building the current GEP, focused on creating the appropriate conditions to implement the positive actions in view and to monitor and assess their impact.

#### 4. Gender Balance Diagnostic 2020

The GEP to be described (Section 6) builds on the results of the characterization of the gender profile of INEGI's internal personnel, referring to the end of 2020. This characterization is based on the assessment of a set of indicators considered relevant and adequate to INEGI's scope of activity, as follows.

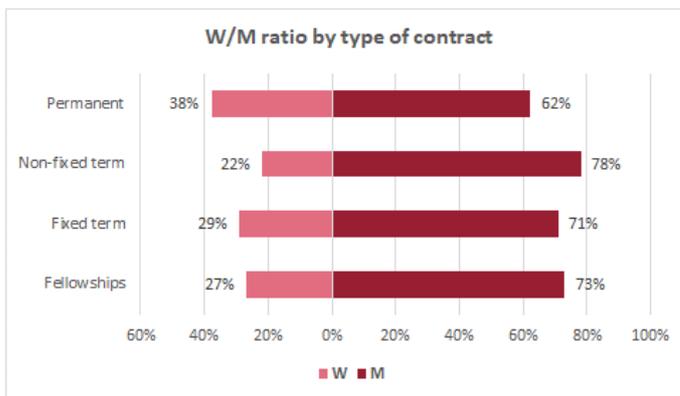
INEGI's scope of activity attracts more men than women, as depicted from Fig. 4a. The W/M ratio is line with that of the FEUP student population in the same period (Section 1). The administrative technicians and project managers are job functional families mainly composed by women, while men are the large majority in professional technicians, leading management and fellowship holders positions (Fig. 4b).

The W/M ratio tends to increase with the level of responsibility, at the exception of the Director category, and type of contract (Fig. 4c and Fig. 4d, respectively). This shall directly contribute to the higher average seniority of women, as shown in Fig. 4e. Men are typically predominant in Engineering positions, with higher mobility in the overall employment market, resulting in their lower seniority within INEGI.

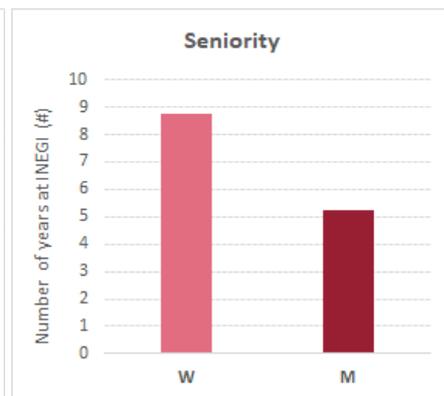




c)



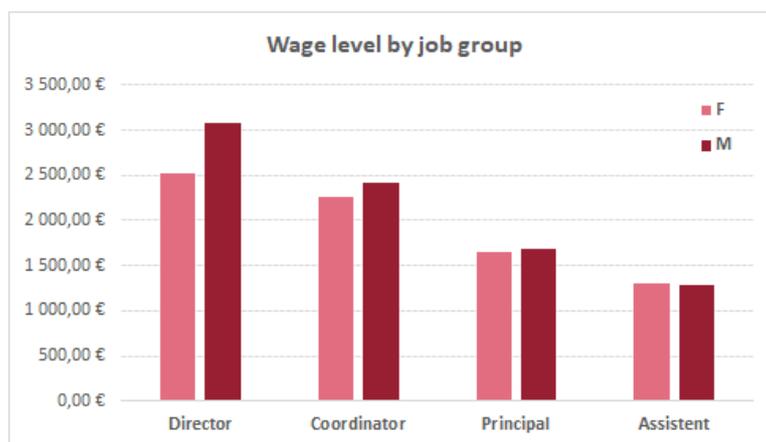
d)



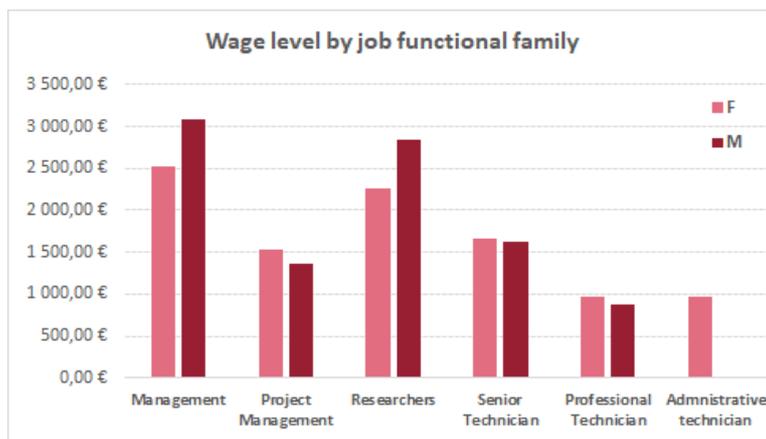
e)

**Fig. 4: Gender distribution within INEGI's internal personnel: a) overall, b) by job functional family, c) by job group, d) by type of contract and e) by average seniority (2020).**

The W/M ratio impact on the wage level can be analysed from Fig. 5. Differences on the wage value tend to slightly increase with the level of responsibility, favouring men, while wage of women in management and research positions tends to be higher.



a)



b)

Fig. 5: Average wage per gender by a) job group and b) job functional family.

## 5. Existing measures framing gender equality aspects

The analysis on Section 4 reveals and confirms the expected imbalance on the gender distribution among INEGI's people, in line with the historical disparity on both the higher availability of men in the STEM areas and of women for administrative positions. Despite this, INEGI has in place a set of procedures promoting that its activity runs on a quite neutral and non-discriminatory basis. Table 1 compiles the main measures INEGI has been incorporating in its management strategy promoting effective GE and avoiding discrimination based on gender, while emphasizing the importance of harmonizing personal life, family and professional development of its people.

Table 1: Measures and procedures already implemented by INEGI framing gender equality.

Purpose	INEGI's Measures / Internal Regulation
<b>Work-life balance</b>	Commitment with ensuring the personal and professional development of its persons included in INEGI's Mission and Vision statements, as well as Values.
	Flexible working model established (flexible daily timeline; home-office until a maximum of 6 days/3 months).
	Special working model for parents with children under 3 years old (flexible daily timeline; home office until a maximum of 40% working time/month).
	Parenthood incentives: Christmas gifts for children up to 12 years old; yearly allowance to support educational expenses with school age children; extra leaves for men willing to participate in prenatal consultations and childbirth preparation sessions.
	Extra days off next to holidays and birthday (3 days).
Protocols with external providers of personal care services (e.g. Fitness Hut and Go Gym).	
<b>Non-discrimination</b>	People recruitment and career management processes based on meritocracy, and not on gender, ethno or any other type of classes.

	<p>Recruitment opportunities are published in open platforms of wide audience, besides the INEGI's website. Non-discriminatory language is insured both in written form (job announcements) and in oral form (job interviews).</p> <p>Career development along Job Categories, Job Groups and Job Families pre-defined in internal regulations, made equally accessible to all persons, and based on regular standardized evaluation. No specific reference to gender aspects in the related documents.</p> <p>Wage table based on positioning in Professional Categories, Job Groups and Job Families model.</p>
	<p>Positive evolution (though limited) towards inclusiveness of women in the composition of INEGI's governing bodies, including the Supervisory Board (1/3) and the Board of Directors (1/5).</p>
	<p>Increased diversity of the evaluation panels in the recruitment process, induced by the increase in the number and plurality of background areas within INEGI people.</p>
	<p>Communication Policy and Communication Commission in place. No specific reference to gender aspects. Communication campaigns make visible the work developed by women at INEGI, in a non-formal basis.</p>
	<p>HR suggestions / complaint mechanisms in place.</p>
	<p>Presentation of the new personnel to all INEGI internal community, through the regular 'Boas vindas INEGI!' newsletter.</p>
<b>Gender aspects properly addressed in R&amp;I activities, when relevant</b>	<p>Within INEGI's activity in some R&amp;I areas, data analysis requires due attention to gender related aspects (e.g. Energy and Environmental Sustainability, Human-centred Production, or Biomechanics). Data collection already includes informed consent forms and voluntary participation, and participants' anonymity and data confidentiality is ensured. Nevertheless, procedures for the specific gender-disaggregated data processing and analysis are not yet standardized.</p>
<b>Other related initiatives</b>	<p>Among others, the International Woman's Day is particularly celebrated on a yearly basis. Video created in 2022 highlights the different positions and activities women are currently assuming within INEGI, promoting not only INEGI as a women-friendly organization but also the attractiveness of the Technology and Engineering areas to women.<sup>10</sup></p>

In addition, the following actions foreseen in INEGI's Strategic Plan for 2022-2027 are to be highlighted, due to its relevance to the context in which the GEP 2022-2024 will be developed: 1) the restructuring of the Human Resources Services (SRH), including the reinforcement of technical competences in the areas of People Development and Talent Management, and 2) the creation of an internal academy to support the integration of new people and the requalification of the existing one.

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<sup>10</sup> INEGI, International Woman's Day 2022, <https://www.inegi.pt/en/news/women-s-day-what-it-s-like-to-be-a-woman-and-an-engineer-at-inegi/>

## 6. Gender Equality Plan

The previous data analysis enabled to point out GE challenges within INEGI. Despite the non-discrimination practices and context already established at INEGI, there is room to foster a more active woman-friendly recruitment and career management, to promote the access of women to positions of higher responsibility, to promote the retention of talented men (but also women), and to address the factors behind the significantly higher absenteeism of women. Besides, and as advanced in Section 3, GE-supporting structures, both at human and systems level, considered essential to effectively promote and monitor GE in all its dimensions, are still lacking.

Table 2 presents the INEGI's GEP for the period 2022-2024, providing actions to address the above challenges. The GEP 2022-2024 is structured in 4 framing areas, namely: 1) 'Recruitment, selection and career progression support'; 2) 'Gender biases and stereotypes, sexism and sexual harassment', 3) 'Gender dimension in research and knowledge transfer', and 4) 'Cross-cutting actions', mostly focused on establishing the required new supporting structures. Besides other actions aiming to update internal regulations according to the results to be achieved, or to reinforce relevant existing practices (e.g. work-life balance, inclusive communication), new initiatives and procedures aiming to trigger GE positive behaviours, particularly benefiting from the current context of higher awareness on GE aspects, are also here advanced. Most actions are in the scope of the activity of INEGI's Human Resources Services (SRH) and of the Communication & Imaging Services (SCI), eventually supported by the Information & Systems Services (SIS) or the Financial and Administrative Services (SAF) in what refers to monitoring tools and other data collection resources. Actions under the responsibility of the Executive Board (EB) are also included. INEGI's organigram is shown in Fig. 6.

INEGI's SRH will act as the coordinator of the Working Group for Gender Equality (GTIG - Grupo de Trabalho para a Igualdade de Género) to be created and assuming the responsibility for the overall GEP implementation. Among other coordination and operational roles, the SRH will be responsible by insuring the interface with the EB. INEGI's GTIG will join bimonthly, at least, and the main tool to be used for the GEP progress monitoring is the yearly reporting.

**Table 2: INEGI's action plan to tackle gender equality aspects, relative to the period 2022-2024.**

Objective	Actions/Measures	Owner	Target Group(s)	Indicators and/or deliverables (#; description)	Resources	Timeline
<b>0. Cross-cutting actions</b>						
0A. Ensure relevance and impact of the GEP actions	a) Set the Working Group for Gender Equality as a formal operational team responsible for the GEP implementation, and establish GEP updating as a bi-annual procedure.	EB	INEGI Unit Directors	INEGI's Working Group for Gender Equality	GEP preparation team	October 2022
	b) Implement gender-focused statistics and diagnostic process as a yearly monitoring internal procedure. Includes, among others: - Review and updating personnel database; - Performing surveys involving all INEGI internal personnel.	SRH SIS	All INEGI internal personnel	Gender-focused analysis report	Personnel database RAC	End 2022
	c) Include gender-based indicators in the annual key figures and public reports.	EB SCI	All INEGI internal personnel	Gender-based indicators among INEGI's yearly key figures (Areas 1-3)	RAC	End 2022
	d) Update the main documents ruling Persons Management and related internal policies, according to the outputs of the GEP actions implemented.	SRH	All INEGI internal personnel	Updated SRH documents	INEGI's SRH documents	End 2023
<b>Area1: Recruitment, selection and career progression support</b>						
1A. Reduced vertical segregation - Improve mechanisms to attract and retain W/M to	a) Gather additional data and analyse in more detail the diagnostic of the categories / areas where the W/M ratio is more unbalanced.	SRH EB	All internal people	1.1. Gender ratio by job group; 1.2. Gender ratio by job functional family;	Monitoring / Reporting process	Yearly

professional categories/work areas where they are underrepresented	b) Define case-specific action plans to implement appropriate mechanisms enabling to reduce W/M imbalance.			1.3. Gender ratio by seniority (# of years at INEGI).		
<b>Area2: Gender biases and stereotypes, sexism and sexual harassment</b>						
2A. Enhanced work-life balance - Further advances on family-friendly internal policies and personal care benefits	Evaluate conditions to further advance on home-office and personal care benefits, e.g.: - Gradual increase of home-office time in the flexible working model, towards more balanced hybrid working models; - Additional parenthood support measures; - New partnerships to provide additional benefits related to personal care.	SRH EB	All internal people	2.1. Share of people covered by flexible working models 2.2. Number of days in home-office for all eligible persons	Monitoring / Reporting process	Yearly
				2.3. Share of people with young children (age limit to be defined)		
2B. Promote awareness on GE-specific aspects, both through internal and external communication	a) Create internal communication channels and tools to support GEP implementation. Covers targeted awareness activities, but also internal communication about the GEP activities and related achievements.	SRH	All internal people	Internal communication plan supporting the GEP (e.g. # awareness sessions / year; Internal newsletter)	Existing SRH newsletter format Professional trainers/speakers Base Funding (eventual financial support)	End 2023
	b) Define a plan to support the external communication of the GEP activities and related achievements.	SCI SRH	INEGI's community overall	External communication plan supporting the GEP (e.g. news on INEGI's external communication channels)	INEGI newsletter/ website / RAC Communication Commission	Yearly
2C. Insure counselling / access to professional support on gender-based offenses and harassment	Implement a specific channel to address offenses and harassment for impartial and independent analysis, and define the contact, process flow and related analysis procedures.	SRH EB	All internal people	Internal channel and procedures for addressing gender-based offenses and harassment.	Personnel with previous experience in leading GE focus groups and/or ethical issues.	End 2022
<b>Area3: Gender dimension in research and knowledge transfer</b>						
3A. Insure standardized data collection and	Develop guidelines and templates to harmonize and standardize procedures for	SRH	Relevant R&I groups	3.1. Number of funded R&D projects, applying internal guidelines on gender aspects	Funded projects support services (SAF)	End 2022

analysis of gender aspects in research	gender disaggregated data analysis within the relevant R&I groups.					
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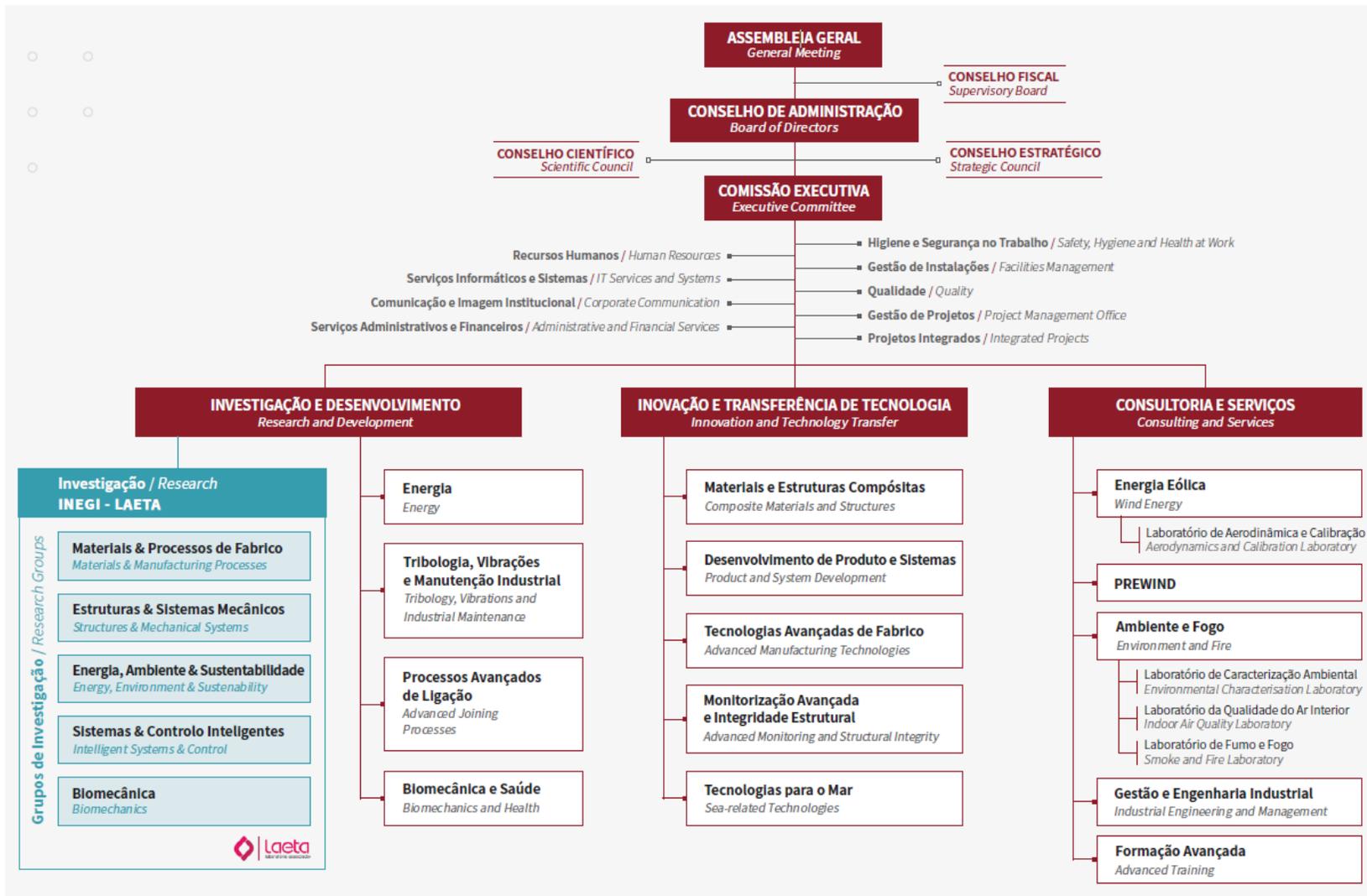


Fig. 6 : INEGI's organigram (last update 2021).

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INEGI – Institute of Science and Innovation in Mechanical and Industrial Engineering



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(President of the Board & CEO at INEGI)