
GENDER-NET Plus

**Report on national & regional
initiatives on the integration of the
gender dimension in research
content**

A study of 17 European countries, Israel and
Canada

Deliverable 6.2 - EXCERPTS -



Authors: Zulema ALTAMIRANO, Lydia GONZALEZ (MICINN)

Report's scope

This study was led with reference to the 2016 *Compendium of national initiatives on the integration of the gender dimension in research contents* designed under Gender-Net initiative¹. Its purpose is to capture **successful national and regional policies, programmes, plans and strategies that facilitate the integration of sex and gender analysis into research** and likely to be tailored within transnational contexts and implemented across countries. Its aim is two-fold: to **provide a comparative analysis** and collection of national promising practices but also to **produce a useful tool** for GENDER-NET Plus affiliated RFOs and beyond **on how to systematically integrate the gender dimension into research content through the policy cycle of research funding**. It is based on the answers to a questionnaire distributed to 39 organisations involved in research funding and affiliated to Gender-Net Plus & Science Europe. This sample includes 20 participating organisations from Europe and associated countries such as Norway, Canada & Israel.

¹ The report is available here:

[Compendium of national initiatives on the integration of the gender dimension in research contents.pdf](#)

More information on the Gender-Net initiative can be found here: [GENDER-NET ERA-NET](#)

Summary

In spite of efforts at EU level to promote gender equality policies in RFOs, the collected data shows quite some **diversity and disparities regarding gender equality policies on the integration of the gender dimension in research content**. It is noticeable that the current political context in the European Research Area is **more favourable** than the one in which GENDER-NET 2015 report was designed: RFOs do now have a clear mandate from the European Commission to ensure that funded research is free from gender bias. Besides, the scope of existing resources such as collections of evidences, references, materials and guidelines is now quite extensive.

Yet, many RFOs are working on dedicated initiatives across Europe and beyond by implementing sometimes isolated or combined activities that do not ensure consistency and sustainability. Moreover, the available information suggests that the progress made by RFOs since GENDER-NET's 2015 survey is also quite diverse.

Some RFOs have decisively advanced on specific policies and structures to promote the gender dimension in R&I while others still have not taken off in spite of participating in gender equality initiatives. This leads to **various levels of emphasis on the gender dimension in scientific production through the European Research Area**.

This report has focused on rooms for improvement within the RFO's dedicated policy frame in order to encourage them to continue this work and make it more impactful and sustainable in their organisational structures, but it has to be noticed that **positive figures were also found**: promising practices were identified, some of which recently implemented and others with a longer tradition in highly committed organisations.

Second, half of the respondents reported future actions currently under process in their institutions, so there is a **clear will to move the integration of gender analysis into research content forward in the immediate future**. Experience suggests that once RFOs claim to be interested in introducing these policies, they take decisive steps (as one participating organisation did from 2015 to 2020).

In summary, starting from the promising practices highlighted in 2015's recommendations, this report has focused on moving forward from the stage of adopting initiatives in RFOs as "gender awareness measures" to the phase of developing a **specific, consistent and sustainable policy to adequately consider IGAR during the whole funding cycle of research projects**.

Relatedly, since most of participant RFOs have not yet fully implemented measures to ensure that integrating sex/gender is

considered in the whole lifetime of a research call, there is no yet enough groundwork to advance on IGAR initiatives from an intersectional approach. **The decision-making level of RFOs and the research community will require the necessary skills and policy advice to effectively consider the gender dimension in R&I content from an intersectional perspective.**

GENDER-NET 2015 report provided a set of recommendations to further advance at national and transnational level as summarized below:

- **Provide clear definitions and guidelines** on gender balance/gender equality policies and the gender dimension in research content.
- **Adopt a specific policy or strategy within the institution** aimed at integrating the gender dimension in research content.
- **Count on the high-level support** for the development and implementation of such a policy/strategy.
- **Allocate the necessary budget and resources** for a sound implementation of the aforementioned policy/strategy

followed by a comprehensive monitoring and evaluation system to measure success.

This 2020 study suggests that **the first two recommendations have been widely followed by RFOs.** Several former GENDER-NET consortium partners have nowadays a specific policy in place and the vast majority of the RFOs consulted have indeed developed guidelines and training for applicants and evaluators.

The third recommendation regarding high-level support from institutions to introduce this kind of policies has not been easy considering the challenges with organisational culture and awareness on the relevance of IGAR expressed by the respondents.

Fourth, the need of allocating human and economic resources for a sound implementation of IGAR policies that let us measure success remains a valid recommendation 5 years later. **Indeed, this will be the biggest challenge for RFOs in implementing their dedicated policies in the upcoming years: to close the “IGAR gaps” found through the funding cycle of research projects.**

Selected actions & initiatives

Many RFOs have started to adopt initiatives on gender equality by considering questions regarding the integration of gender analysis into research content (IGAR)² in their calls/templates for proposals. Horizon 2020 was a milestone in this regard and showed the path for the rest of funders. The European Commission began asking applicants to include sex/gender analysis in the research proposals in 2013 by inserting a dedicated question in the application templates. Then, in order to avoid that researchers skip the question, they were encouraged to explain why sex/gender variables are not relevant in the object of study/field of research when a negative response was alleged.

1. Policy requiring applicants to specify whether they are considering sex and/or gender in their research proposal

It is one of the most extended measures among RFOs (70,5% of the sample):

- In the dedicated templates shared by a Nordic participant to the survey, the applying researchers are asked to describe how/if the sex and gender perspective is relevant for the proposed research, and how/if this is taken into account in the

proposed research.

- In the project-based awards of another participating organisation, the applicant is asked to reflect on the gender dimension or lack thereof in their mid-term review. However, smaller individual awards are not asked to report.
- Several RFOs also include different guiding questions and suggestions to help applicants and evaluators take account of the sex/gender analysis (“Does the project aim at innovation that is directly based on gender or sex?”; “The object of evaluation will be your adequate assessment of whether it is / it is not relevant to integrate gender or sex dimension”).

2. Guidelines and training on sex/gender analysis

2.1 For the research team as eligible cost

When gender expertise is not included in a proposal of research team/advisory group, gender knowledge needs to be provided for

² The authors refer here to a notion developed under GENDER-NET framework, giving birth also to

the [IGAR tool](#). The notion will be used along this document.

the research team. The best incentive for that purpose is to consider training on IGAR as **eligible costs** under particular research calls. This measure was introduced for the first time in Horizon 2020 and has since then been adopted by 5 participating organisations.

2.2 For evaluators/applicants

The distribution of guidelines for evaluators and applicants was part of GENDER-NET recommendations and became a popular initiative among the respondents of the 2020 survey. 65% of the sample provides guidelines on the gender dimension of R&I for evaluators, who are the primary responsibility of RFOs as targets. Experience shows that once they have developed guidelines for evaluators, they tend to do so for applicants. The implementation of training tailored to such target groups is in contrast likely to require more commitment, efforts and resources by the RFOs. In person and online training process for evaluators and/or applicants is nonetheless in place in 6 participating organisations.

3. Formal process to evaluate sex/gender analysis into R&I

The existence of a formal process to evaluate sex/gender analysis into R&I is an indicator of RFOs policies' consistency. Only 4 respondents designed a formal procedure to ensure that the gender dimension is

adequately evaluated and not solely required for applicants at the beginning of research projects' funding cycle. One participant organisation includes the gender dimension as one of the evaluation criteria for international assessors' consideration in scoring and ranking applications. Similarly, in another case, reviewers are also asked to include the gender dimension part of the applications in their assessment.

Although a third one (located outside of Europe) hasn't reported a formal process to evaluate sex/gender analysis, it is one of the aspects considered in the merit of research proposals.

One of the most important key messages to be integrated in the scientific evaluation systems is that **the inclusion of the gender dimension in R&I is considered as an integral part of the scientific quality of the research**, as claimed to be the case in a fourth participating organisation.

4. R&I gender experts' inclusion in the evaluation committees

Including gender experts as observers in evaluation committees is one common recommendation to RFOs. While the usual objective is to ask them to observe potential dynamics and gender bias in the evaluation of curricula and women's potential as Principal Investigators, 3 participating organisations have included experts on gender in R&I in evaluation committees to

also pay attention to the importance given by the evaluation committees to criteria on IGAR in the assessment.

5. Other initiatives

5.1 Positive action measures to favour projects that integrate sex and/or gender

This is definitely the most demanding and controversial measure. Only one participating organisation has been able to introduce these temporary special measures. The philosophy behind positive action measures is that public funding is better used in research that avoids any bias and that produces knowledge taking into account social needs and perspectives of both women and men and address them accordingly, and thus contributes to the whole society and its challenges in a more effective and democratic manner.

5.2 Dissemination materials on the gender dimension in R&I

Disseminating materials on the gender dimension of R&I is closely related to RFOs' recurring communication campaigns needed to normalize the message of sex/gender analysis as a stable requirement in

proposals. While developing their own dissemination materials may be demanding by RFOs without experts on gender in R&I, distributing the dissemination materials produced by other institutions is a less demanding activity to create a repository on IGAR. 4 participating RFOs do include dissemination materials on their websites.

5.3 Communication campaigns to make the support to sex/gender analysis visible

Developing communication campaigns on the relevance of the gender dimension in R&I for the organisation is crucial to make the research community aware of the need to be prepared in advance to include sex/gender analysis in their proposals. In other words, if researchers experience the topic for the first time when filling in templates, they may see sex/gender analysis as an added box to the template and not as a matter of quality in science that must start when thinking about the research topic and research questions. 5 participating RFOs develop this kind of communication campaigns.

Recommendations

1. At the EC /GNP consortium level:

R1 There is a need to close the gap between the different levels of experience and results so that the European Union can ensure that the production of knowledge under the new ERA is free from gender bias in every country. This can be provided by different lines of action:

- RFOs are included under the policy that establishes gender equality plans as an eligibility criterion in Horizon Europe. But still **GEPs in RFOs will need to consider IGAR as a priority field of action.**
- **Provide technical support** to those RFOs under GENDER-NET Plus that are willing to integrate the gender dimension in the research projects they fund.

R2 Once RFOs have contact with a transnational activity on gender equality policies, they tend to take steps further, at least in terms of funding research from a gender perspective. Thus, it is important to work on two lines of action:

- The sustainability of the GENDER-NET Plus activities in the future partnerships

configuration of Horizon Europe to guarantee that:

- Funding gender research is among the priorities for RFOs across Europe and beyond
- The emerging alignment of policies among GENDER-NET Plus partners regarding IGAR can be settled down in the organisations
- The active promotion of the role of observers in GENDER-NET Plus **as well as a wide dissemination of the gender equality policies adopted by its members, in order to extend the RFOs community interested in IGAR**

R3 Enhance the promotion of multilateral research agreements that foster the integration of the gender dimension in R&I in international cooperation in science, technology and innovation.

R4 The question requiring applicants to explain whether they are considering the gender dimension in the research proposal in Horizon 2020 was a milestone in this regard and showed the path for the rest of funders. In this sense, **this requirement**

needs to be reinforced in Horizon Europe ensuring a proper evaluation of the gender dimension at the level of proposals and also in the monitoring & evaluation of projects funded. By doing this, Horizon Europe will become a role model for every research funding organisation involved in the ERA.

R5 The **promotion of sex/gender analysis** at university-level of curricula will certainly avoid that research proposals in the future continue to be sex/gender-blind. **Taking action in early stages of the training received by researchers** of the coming decades **needs to be considered as an integral part of the alignment of agendas in terms of gender equality policies in R&I**, particularly to achieve one of the most important objectives of the European Commission such as the gender dimension in R&I content.

R6 **Carefully consider the conclusions** that will be reached by the working group created at the **SWG GRI on gender and intersectionality** as well as by the study launched at the EC, particularly those related to the research system and the research content. This may well be a starting point for the necessary policy advice required by the decision-making level of RFOs and the research community.

R7 **Consider the design of additional activities under GENDER-NET Plus to strengthen mutual learning among the RFOs** involved regarding IGAR initiatives. For

this purpose, and taking into account the limitations of surveys even with open questions, a qualitative approach could be useful, particularly the development of focus groups with people in charge of IGAR initiatives in the RFOs. Such a strategy would be a live learning experience for GENDER-NET Plus members and would enrich the present report with first-hand, qualitative information.

2. At the national authority level:

R8 Adopt the recently announced policy of the EC for Horizon Europe and **make sex/gender analysis a mandate** in research calls.

R9 **Reflect on a framework for good practices** in the design of gender equality strategies and IGAR initiatives that draw inspiration on the international framework for promising practices from a gender perspective.

R10 **Define a specific, tailored policy on the gender dimension of R&I content** that shows consistent action throughout the funding cycle of research projects.

R11 **Develop gender equality structures** at national and regional RFOs that can dedicate more efforts to ensure the consistency of IGAR and close the existing gaps. This

requires gender structures, economic resources and gender experts.

R12 Count on gender expertise in R&I in the design of gender equality policies in RFOs, since some inconsistencies have been noticed during the analysis of GEPs in the RFOs respondents (sometimes **there is not a proper distinction and understanding of IGAR and other gender equality objectives and fields of action**).

R13 Include gender indicators on IGAR in the monitoring and evaluation procedures for research projects funded, what will require training and materials on IGAR for these evaluation panels/experts. GENDERNET Plus has introduced different IGAR indicators for co-funded projects that can serve as inspiration. Sending the message to the research community of the correspondent countries that gender equality and IGAR will be taken into account in the evaluation of projects funded can make a difference to take the matter seriously.