

# Guidelines on Gender Dimension in Research - Horizon Europe Funds



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## **Guidelines on Gender Dimension in Research - Horizon Europe Funds**

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### **EEA Grants**

Through the Agreement on the European Economic Area (EEA), Iceland, Liechtenstein, and Norway are partners in the internal market with the Member States of the European Union.

To promote a continued and balanced strengthening of economic and trade relations, the parties to the EEA Agreement have established a multi-annual financial mechanism known as EEA Grants.

EEA Grants aim to reduce social and economic disparities in Europe and strengthen bilateral relations between these three countries and the beneficiary countries. For 2014-2021, a total contribution of €2.8 billion has been agreed upon for 15 beneficiary countries. Portugal will benefit from a sum of 102.7 million euros.

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# 1. Gender Equality in Horizon Europe

## 1.1 General Introduction

Horizon Europe sets gender equality as a cross-cutting principle and aims to eliminate gender inequality and intersecting socioeconomic inequalities throughout research and innovation systems, including by addressing unconscious bias and systemic structural barriers.

There are 3 main levels at which Gender Equality is considered in Horizon Europe:

- i. [Gender Equality Plan \(GEP\)](#) as an **eligibility criterion**;
- ii. [Integrating the gender dimension into research and innovation content](#) is a **requirement** by default, an award criterion evaluated under the excellence criterion;
- iii. [Gender Balance in Research Teams](#): Gender balance among research teams is set as a **ranking criterion** for proposals with the same score.
  - Researchers have the possibility to self-identify in proposals and project reporting according to three gender categories: woman, man, or non-binary.

When drafting a proposal, the applicants must consider these 3 levels.

Additionally, other 3 arrangements are put in place to reinforce some areas:

- i. Specific funding is made available for actions supporting the development and implementation of inclusive gender equality plans in research and innovation organisations across the EU Member States and associated countries under the **Widening Participation and Strengthening the European Research Area (ERA)** Programme Part.
- ii. Specific funding focused on **gender studies and intersectional research**, particularly under Pillar II of Cluster 2 – Culture, Creativity and Inclusive Society.
- iii. Flagship measures and activities for **promoting gender equality under Pillar III**, notably through the **European Innovation Council (EIC)**, including a target of 40% women-led companies invited to pitch their projects in the Accelerator instrument, a target of 50% women among members of EIC advisory structures, a dedicated initiative to support women-led deep-tech start-ups, and the continuation of the EU prize for women innovators.

## 1.2 Gender Balance in Research Teams

Applicants to Horizon Europe funding are encouraged to address issues of gender balance and equal opportunities among the project team members or participants in activities organised by the project.

### Evaluation process

Gender balance comes into play as a ranking factor to prioritise proposals with the same score in each criterion. This is set out in item *Excellence* of [Part D of the General Annexes](#) to the work programme.

If proposals with the same score cannot be prioritised based on the work programme coverage or the criterion *Excellence* followed by criterion *Impact*, the relative gender balance of the consortium teams will be

used to rank the proposals. This information is referred to in [Part F – Procedure of the General Annexes](#) (item 3 of subsection *Evaluation procedure and ranking*).

#### How to assure gender-balanced participation in research ([See section 1.4 of this document](#))

- ✓ Make sure the project consortium and team are gender-balanced at all levels and in decision-making positions
- ✓ Ensure that working conditions and the organisation of activities within the project (e.g., working hours and tasks; scheduling and organising meetings or activities requiring mobility) allow all members of staff and other participants in the project (e.g., target groups) to balance work and family life in a satisfactory manner
- ✓ Contemplate mechanisms to manage and monitor gender equality aspects, e.g., workforce statistics.

### 1.3 Gender Dimension in Research and Innovation Content

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The integration of the gender dimension into R&I content is **mandatory**. It is a **requirement set by default** across all Work Programmes, destinations and topics unless its non-relevance for a specific topic is specified in the topic description, e.g. by the mention, *“In this topic, the integration of the gender dimension (sex and gender analysis) in research and innovation content is not a mandatory requirement.”*

#### Evaluation process

This new requirement is recalled in [General Annex D](#) on **Award Criteria** (for Research and Innovation actions, Innovation actions and Programme co-fund actions), and it is thus reflected in the corresponding application forms (proposal template) under the **Excellence evaluation criterion** (under Methodology). In these cases, evaluators will check how sex and/or gender analysis is taken into account in the proposal and consider this while giving a score under the *Excellence* criterion.

#### What does integrating the gender dimension in R&I content mean?

Addressing the gender dimension in research and innovation thus entails taking into account sex and gender in the whole R&I process, from the setting of research priorities through defining concepts, formulating research questions, developing methodologies, gathering and analysing sex/gender-disaggregated data to evaluating and reporting results and transferring them to markets into products and innovations which will benefit all citizens and promote gender equality.

*Sex* is determined by several *biological* features, according to functions that derive from the chromosomal complement, reproductive organs, or specific hormones or environmental factors that affect the expression of phenotypic traits (morphology) in sexually reproducing organisms.

- In humans: sex refers to the biological attributes that distinguish male, female, or intersex.
- In non-human animals: sex refers to biological attributes that distinguish male, female, or hermaphrodite.
- In engineering & product design research: sex includes anatomical and physiological characteristics that may impact the design of products, systems, and processes. Sex differences may be relevant for many R&I projects.

*Gender* refers to socio-cultural norms, identities and relations that categorise people, structure societies and organisations, and shape behaviours, products, technologies, environments, and knowledge. Gender is an organising principle that structures behaviours, attitudes, physical appearance and habits.

Three related dimensions of gender:

1. gender norms (socio-cultural expectations of what is appropriate for women, men or gender-diverse individuals, often relying on gender stereotypes),
2. gender identities (how individuals or groups perceive and present themselves in relation to gender norms, with most commonly used categories including woman, man, and non-binary or gender-diverse) and
3. gender relations (how sex and gender shape social interactions in families, schools, workplaces and public settings, often involving power relations).

*Intersectionality* describes overlapping or intersecting categories such as gender, ethnicity/racial origin, age, socioeconomic status, sexual orientation and geographic location, that compound to determine the identities and experiences of individuals.

**How to integrate the gender dimension in research content** (See [section 1.4](#) of this document)

When drafting a proposal, you should, in particular:

- Reflect on why sex and/or gender could matter: Think about and present the ways in which taking into account the gender dimension will provide added value in terms of creativity, excellence, and return on investment, both from public and private perspectives.
- Consider the production of new knowledge on gender: Consider what is already known in your area in terms of the gender dimension (e.g. related scientific literature) and identify what is missing. In many areas, gender knowledge still needs to be generated.
- Include sex and gender aspects as part of a multidisciplinary approach: Reflecting on sex and gender considerations in relation to [health](#), [transport](#), [energy](#), [security](#), etc., is a great opportunity to foster cooperation between scientists with gender expertise and others. It helps concepts cross the borders of scientific fields and encourages research methods to evolve.
- Consider social categories/factors intersecting with sex and gender: the way a research problem is formulated will determine which intersecting variables are relevant for analysis. Intersectional research should be designed to illuminate the multiplicative effects of different but interdependent categories. See some examples of intersectional research: [Smart Energy Solutions](#), [HIV Microbicides](#), [Virtual Assistants and Chatbots](#), and [Assistive Technologies for the Elderly](#). More examples might be found on the [Gendered Innovations](#) website.

An increasing body of studies shows that the quality of research and innovation is affected by not taking into account sex and gender analysis. And in many fields, it is crucial to explore whether research outcomes may affect women and men differently. **For instance**:

- Why do we observe differences between women and men in infection levels and mortality rates in the COVID-19 pandemic?
- Does it make sense to study cardiovascular diseases only on male animals and on men, or osteoporosis only on women?

- Did you know that many aspects of taxation have a substantial effect on gender-related socioeconomic inequalities but that when designing tax laws, policymakers still rarely consider gender inequalities?
- Does it make sense to design car safety equipment only on the basis of male body standards?
- Did you know that almost 3/4 of women Internet users worldwide have experienced some form of cyberviolence?
- Why do household travel surveys, and thus mobility analysis and transport planning, underrate trips performed as part of caring work, which is predominantly undertaken by women?
- Should we develop AI products that could spread gender and racial biases due to a lack of diversity in the data used in training AI applications?

**More concrete examples** of how to integrate the gender dimension into research and innovation content in different fields may be found on the Gendered Innovations website.

Watch also the video about understanding the gender dimension for MSCA projects (Understanding gender dimension for MSCA projects).

### Relevance of Integrating the gender dimension in research and innovation

Addressing the gender dimension will contribute to the scientific quality and societal relevance of the produced knowledge, technology and innovation. Moreover:

- adds value to research and innovation in terms of excellence, creativity, rigour, reproducibility and business opportunities;
- helps researchers and innovators question gender norms and stereotypes, rethink standards and reference models;
- leads to an in-depth understanding of all people's needs, behaviours, and attitudes;
- contributes to the production of goods and services better suited to new markets;
- is crucial to secure Europe's leadership in science & technology and support inclusive and sustainable growth;
- fosters recognition of everyone;
- contributes to peace;
- balances societies and communities.

## 1.4 Integrating the Gender Dimension in Research: Resources and Tools

Here is a list of materials containing tools for the transversal integration of a Gender Dimension in Research, applicable to every scientific area.

- [Checklist for Gender in Research](#) – a simple yet detailed instrument that enumerates the requisites for integrating a Gender Dimension in every phase of the research process. Produced by Yellow Window, a specialised consulting firm, with funding from the European Commission.
- [Toolkit for Integrating Gender-Sensitive Approach into Research and Teaching](#) – a document with a didactic and reflexive structure, aiming to provide a tool for the integration of a Gender Dimension, not only in research but also in curricula. Produced by the GARCIA project, with funding from the European Commission.

- [Toolkit Gender in EU-funded research](#) – comprehensive description and analysis of the relationships between gender and research, establishing European Union guidelines for gender-sensitive research and aiming to provide researchers with tools to follow them – through a solid theoretical framing and the detailed exposition of several case studies in diverse scientific areas such as Nanosciences, Ecology and International Cooperation. Produced for the European Commission by Yellow Window, a specialised consulting firm.
- [Gendered Innovations](#) – this website details practical methods of sex/gender analysis for scientists and engineers, providing case studies as concrete illustrations of how the integration of these methods in fundamental and applied research produces excellence in science, health & medicine and practical engineering research. It is a joint project between Stanford University, the European Commission and the National Science Foundation (USA).
- [What is the Gender Dimension in Research?](#) – a booklet that provides a theoretical framing of the intersections between gender and research, followed by case studies on concrete uses of a Gender Dimension in areas such as Health, Energy, Transport and Agriculture. Published by Kilden, a centre for gender perspectives and gender balance in research of the Norwegian Research Council.
- [IGAR Tool](#) – GENDER-NET ERA-NET’s online tool for integrating gender analysis into research. On this website, it is possible to find manuals/tools on how to integrate gender analysis into research, examples and references for a better understanding, recommendations on how to integrate sex and gender analysis into the university curricula in Higher Education, and a range of indicators to support the monitoring and evaluation of these procedures.
- [ERC seminar on Sex and Gender Dimension in Frontier Research \(November 16th 2020\)](#)

Factsheets of the European Commission (EC) with condensed and quick content. In these materials are indicated other references to deepen the topic.

- [Factsheet Gendered Innovations](#) – It summarises the EC policy report’s contents.
- [The impact of sex and gender in the COVID-19 pandemic](#) – This case study examines the impact of sex and gender in the current COVID-19 pandemic.
- [Factsheet on gender and intersectional bias in AI](#) – This material addresses digital transformation and artificial intelligence (AI) and how they are transforming our jobs and lives.

## 1.5 Gender Equality Plan (GEP)

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Under Horizon Europe, a Gender Equality Plan (GEP) must be in place in the institutions to be eligible for funding actions. The European Commission defines a GEP as “a set of actions that aim to promote gender equality through institutional and cultural change in research and innovation (R&I) organisations”. In the following subsections are available information and guidelines about GEP.

### 1.5.1 Institutions with a GEP in place - University of Coimbra

The **University of Coimbra** approved in April 2021 an institutional **Gender Equality Plan (GEP)**, named **Plan for Equality, Equity and Diversity (PIED)**, available on the website of the University of Coimbra on this [link](#). Researchers applying for European Commission (EU) funding using the **University of Coimbra Participant Identification Code - PIC** must answer ‘Yes’ in **Form A** regarding the existence of a GEP approved and signed



by the rector at the University of Coimbra. It is strongly recommended the applicants read the GEP of the University of Coimbra.

More information about PIED@UC can be found at

- ✓ [English version of PIED](#)
- ✓ [Portuguese version of PIED](#)

## 1.5.2 Other Institutions

### What is a GEP, and for whom is it required?

A GEP is a set of commitments and actions that aim to promote gender equality in an organisation through institutional and cultural change.

A GEP is required for individual organisations applying to any funding of Horizon Europe, and belonging to the following categories of legal entities established in the EU Member States or Associated countries for proposals submitted in 2022 onwards:

- Public bodies, such as research funding bodies, national ministries, or other public authorities, including public-for-profit organisations;
- Higher education establishments, public and private;
- Research organisations, public and private.

There are 4 mandatory requirements to develop a GEP. It must:

1. Be a **public document**, published and available on the institution's website and signed by the top management;
2. Have **dedicated resources**, with the commitment of resources and expertise in gender equality to implement the plan;
3. Include arrangements for **data collection and monitoring**: provide sex and/or gender-disaggregated data on personnel and annual reporting based on indicators;
4. Be supported by **training and capacity-building**: promote awareness-raising/training on gender equality and unconscious gender biases for staff and decision-makers.

In addition to these four mandatory requirements of a GEP, the following 5 thematic areas are recommended for its content:

- a) Work-life balance and organisational culture
- b) Gender balance in leadership and decision-making
- c) Gender equality in recruitment and career progression
- d) Integration of the gender dimension into research and teaching content
- e) Measures against gender-based violence, [including sexual harassment](#)

More information about GEP can be found at

- ✓ [Horizon Europe Guidance on Gender Equality Plans](#) – requirements and guidance on how to develop one GEP
- ✓ [General Annexes to the Work Programme](#) (Part B – Eligibility, section *Gender equality plans and gender mainstreaming*) - details on the requirement of GEP
- ✓ [Frequently asked questions on GEP](#)

- ✓ [Gender Equality Plans. An Eligibility Criterion for Horizon Europe](#) – Video made by ACT, a project funded under Horizon 2020
- ✓ [GEAR Tool](#) – Step-by-step guide on GEP

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## 2. Gender dimension in Research funded by the European Research Council (ERC) under Horizon Europe

Women and men are equally able to perform excellent frontier research. This is the view of the European Research Scientific Council. Each process within the ERC - from creating awareness about the ERC to signing grant agreements – is designed to give equal opportunities to men and women. To monitor gender balance in ERC calls, in 2008, the ERC set up a thematic working group dedicated to gender issues (<https://erc.europa.eu/about-erc/thematic-working-groups/working-group-gender-and-diversity>).

Currently, and as set out in the Horizon Europe [ERC Work Programme 2022](#) (p. 11) and the [ERC Scientific Council Gender Equality Plan 2021-2027](#) (p. 2), beneficiaries of ERC grants must aim for gender balance at all levels of personnel assigned to the action, as well as determine the relevance of integrating sex and gender analysis into their research.

### 2.1 General Introduction

Promotion of gender equality in research and innovation is a commitment assumed under Horizon Europe, reproduced in the following gender-relevant operational objective: “to strengthen the gender dimension across the [Specific Programme](#)”.

To accomplish the gender equality demands, the Gender Issues Working Group was created in July 2008, a permanent structure under the ERC Scientific Council. It is responsible for monitoring gender equality throughout the entire ERC process. Hence, the ERC Scientific Council’s Gender Issues Working Group sets up the following objectives for the duration of the Horizon Europe programme:

- i) To continue raising awareness about the ERC gender policy among potential applicants;
- ii) To improve the gender balance among researchers submitting ERC proposals in all research fields;
- iii) To raise awareness about the benefits of gender balance among researchers within the ERC teams;
- iv) To continue identifying and removing any potential gender bias in the ERC evaluation procedure;
- v) To continue monitoring possible differences in gender-specific careers and academic posts following the ERC grants;
- vi) To embed gender awareness within all levels of the ERC processes - from creating awareness about the ERC to grant signing - while keeping the focus on excellence;
- vii) To strive for gender balance among the ERC peer reviewers and other relevant decision-making bodies, aiming at a minimum participation of the underrepresented gender while taking into account the situation in the field of action. Also, the proportional representation of genders should be at least equal to that of the applications by the underrepresented sex in the Advanced grants in the same area, aiming at the level of 40% in the future.

### 2.2 Evaluation Process

The evaluation process of proposals submitted to ERC Grants comprises the following criteria:

- a) To be eligible for calls with deadlines in 2022, legal entities from a Member State or Associated Country that are public bodies, research organisations or higher education institutions (including

private research organisations and private higher education institutions) **must** have a **gender equality plan (GEP)** or an equivalent strategic document in place for the duration of the project.

- b) Under the research project, Principal Investigators should determine the relevance of integrating sex and gender analysis into their research.
- c) It requires the promotion of equal opportunities between men and women in the implementation of the research and aims for a gender balance at all levels of personnel assigned to the action, including at supervisory and managerial levels.

Principal Investigators also may engage scientists with gender expertise among the essential research staff. Additionally, specific activities promoting equal opportunities or gender balance or covering the gender dimension of research funded by the ERC (e.g. courses on the gender dimension in research, bibliography on gender dimension, bibliography produced by women authors) can be considered eligible costs. The activities classified as eligible costs must be necessary to implement the action or help researchers develop and share gender expertise concerning the project.

## 2.3 Relevance of Integrating the Gender Dimension in Research and Innovation

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Addressing the gender dimension will contribute to the scientific quality and societal relevance of the produced knowledge, technology and innovation. Moreover:

- ✓ It is an added value in terms of excellence, creativity, and business opportunities;
- ✓ It helps researchers question gender norms and stereotypes, rethink standards and reference models;
- ✓ It leads to an in-depth understanding of both genders' needs, behaviours and attitudes;
- ✓ It also contributes to the production of goods and services better suited to potential markets;
- ✓ It is crucial to secure Europe's leadership in science and technology and support inclusive and sustainable growth.

## 2.4 How to Integrate the Gender Dimension in ERC Projects

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Determine the relevance of integrating sex and gender analysis in the research project:

- ✓ Are there any sex/gender differences that should be investigated and addressed?
- ✓ Have you questioned the gender assumptions that can influence your scientific priorities, research questions, and methods?
- ✓ Do you expect that your research findings affect males and females, women and men, girls and boys differently?

Watch the video about understanding the gender dimension for MSCA projects (Understanding gender dimension for MSCA projects) for inspiration.

Look at examples of the gender dimension in the ERC Grants under the event [SEX AND GENDER DIMENSION IN FRONTIER RESEARCH](#), which took place online in November 2020.

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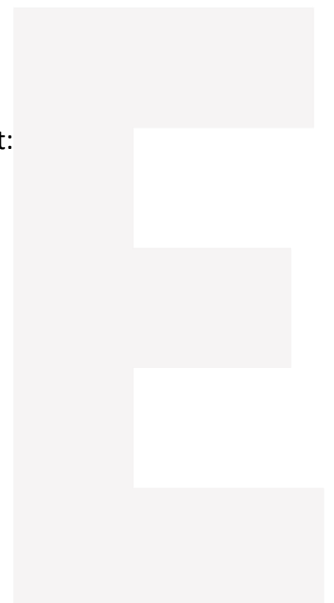
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## 3. Gender dimension in Research funded under Horizon Europe Marie Skłodowska-Curie Postdoctoral Fellowships

Please note that **gender equality** is one of the main principles/objectives of Marie Skłodowska-Curie Actions (MSCA). As established in the [Horizon Europe Work Programme 2021-2022 MSCA](#) (p. 8), beneficiaries of MSCA grants are encouraged to integrate the gender dimension in their research and innovation (R&I) proposals.

### 3.1 MSCA Postdoctoral Fellowships

Under Horizon Europe, beneficiaries of MSCA grants are encouraged to consider the gender dimension and other diversity aspects if relevant to the research project. In line with the European Charter for Researchers and Code of Conduct for the Recruitment of Researchers, all MSCA-funded projects are encouraged to take measures to facilitate international and inter-sectoral mobility and counteract gender and disability-related barriers to it.

### 3.2 Evaluation Process

Proposals for MSCA postdoctoral fellowships are evaluated under three criteria: (i) Excellence, (ii) Impact, and (iii) Quality and efficiency of the implementation. Each criterion is scored out of 5 with a different weighting factor: Excellence - 50%, Impact - 30%, and Quality and efficiency of the implementation - 20%.

One of the items criterion Excellence evaluates is the “soundness of the proposed methodology”, where the gender dimension is deemed as a plus value.

### 3.3 Relevance of Integrating the Gender Dimension in Research and Innovation

Addressing the gender dimension will contribute to the scientific quality and societal relevance of the produced knowledge, technology and innovation. Moreover:

- ✓ It is an added value in terms of excellence, creativity, and business opportunities;
- ✓ It helps researchers question gender norms and stereotypes, rethink standards and reference models;
- ✓ It leads to an in-depth understanding of both genders’ needs, behaviours and attitudes;
- ✓ It also contributes to the production of goods and services better suited to potential markets;
- ✓ It is crucial to secure Europe’s leadership in science and technology and support inclusive and sustainable growth.

### 3.4 How to Integrate the Gender Dimension in Horizon Europe Projects

Determine the relevance of integrating sex and gender analysis in the research project:

- ✓ Are there any sex/gender differences that should be investigated and addressed?

- ✓ Have you questioned the gender assumptions that can influence your scientific priorities, research questions, and methods?
- ✓ Do you expect that your research findings affect differently males and females, women and men, girls and boys?

Watch the video about understanding the gender dimension for MSCA projects (Understanding gender dimension for MSCA projects).



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