

ERA OF INCLUSIVE GENDER EQUALITY

SUSTAINING MOMENTUM AND ADDRESSING CHALLENGES THROUGH JOINT ACTION

This position paper on the future of gender equality in the European Research Area (ERA) has been prepared on the occasion of the GENDERACTIONplus conference organised under the auspices of the BE PRES on 13 February 2024 as a background to the debates of actions needed.

Introduction

Significant advances to address gender inequities have been made at the European and country levels in the European Union since 2020, as evidenced in the [Ljubljana Declaration](#), [EU Pact on R&I](#), [ERA Policy Agenda 2022 to 2024](#) with the ERA Action 5, and the [gender equality provisions in Horizon Europe](#) with the Gender Equality Plan (GEP) eligibility criterion and the requirement of the gender dimension in research and innovation (R&I) by default.

Gender equality actions in European policymaking and in EU R&I specifically do not follow a linear pathway and there is always a risk of backsliding and retrenchment (Linková and Mergaert [2021](#), European Commission [2010](#): 211-222). Periods of positive development toward structural solutions are hampered by ambitionless periods of inaction and lacklustre solutions, where past policy developments are not followed through and where lessons learnt from monitoring and evaluation exercises are not taken up in the subsequent policy cycle.

Today more than ever before, because of the recent ambition and actions of multiple stakeholders in the ERA, **we must work to collectively safeguard achievements**. In the EU we may never secure clearcut political support across all Member States for ambitious intersectional gender equality action, but this should not be a reason for inaction, stalled development, and lethargy.

The current level of activity must continue, and the time to act is now because multiple policy processes are currently underway or being launched against the backdrop of the

upcoming 2024 European Parliament elections. We must ensure and guarantee that recent important policy commitments have the space to take root and further develop at all levels in the EU R&I community.

To this end, it is critical that gender equality and inclusion is confirmed as a policy priority for the upcoming period for the ERA Policy Agenda 2025 to 2027 and that the gender equality provisions in the next Framework Programme 10 (FP10) are not only maintained but also further reinforced with bold measures to address the new challenges posed by the poorly understood intersectional perspective and the lack of responsive action by the private sector.

Why we need to sustain momentum

Inclusiveness and intersectionality

There is broad agreement at the policy level as well as in scholarly debates that it is vital to expand actions aimed at addressing gender inequity and to include other equality dimensions that apply an intersectional approach and the principles of inclusiveness. Significant challenges exist to translating this goal into concrete actions.

The [GENDERACTIONplus analysis](#) has revealed that:

- The policy area of inclusion and intersectionality is at an **initial phase** in European R&I policies.
- There is a **lack of the common understanding of concepts and terminology** on inclusion, diversity, and intersectionality among policy makers, civil servants, and the research community at large and on the practical implications of these concepts in R&I policy and the R&I funding process.
- There is a **lack of research and disaggregated data** at the national and European levels to enable an intersectional approach to be adopted.
- Countries and institutions have an **uneven level of knowledge and experience** working with several equality dimensions, and some countries face political barriers.
- Policies on multidimensional equality at the national level are more articulated than policies at the level of Research Funding Organisations (RFOs).

To address these persistent challenges, there is a need for:

- A **joint forum for sharing research, data, and best practices** on intersectionality and inclusiveness in higher education and R&I at the European level.
- The development of **sector-based competence** in how to translate theory into policy and active measures and tools as well as methods for integrating intersectional and inclusive approaches in R&I.
- **Research** into how research performing organisations can deal with intersectionality, taking it into account in their structures and cultures.
- The strengthening of RFOs' capacity to integrate an intersectional and multidimensional approach in the **R&I funding process**.



Our ULTIMATE GOAL is to include more equality dimensions and intersectional data in research and data collection in European R&I so as to serve the development of inclusive policies, sustainable research careers, and GEPs.

Monitoring as a tool to foster comprehensive and sustainable institutional change

The monitoring and evaluation of GEPs at the national/regional level plays a critical role in understanding the long-term impact and sustainability of GEPs and gender equality work.

The [GENDERACTIONplus analysis](#) has revealed that:

- There is a **lack of consistent policies** on the monitoring and evaluation of GEPs in R&I at the EU and national levels, which is preventing a consistent approach from being applied across Member States (MS) and Associated Countries (AC).
- The monitoring and evaluation of GEPs plays a **critical role in understanding the long-term impact and sustainability of GEPs** and gender equality work.
- An **intersectional approach to GEPs has not yet been fully integrated**.

To address these persistent challenges, there is a need for:

- **Guidance from the European Commission (EC)** on monitoring and evaluating GEPs so that national/regional authorities are enabled to adopt a robust monitoring system for inclusive and intersectional GEPs which are aligned with current Horizon Europe and future FP10 GEP requirements.
- Greater **emphasis placed on monitoring and evaluating GEPs by the EC and by national authorities**, as this is critical to measuring and understanding the impact of GEPs as an instrument for institutional change and ensuring the sustainability of gender equality work.
- Monitoring and evaluation going beyond the Horizon Europe GEP requirements and recommendations in order to fully **incorporate an intersectional and inclusive approach** to gender equality to address groups that are at risk of discrimination.
- Stakeholders in the innovation sector (private sector, public sector, civil society) being required to have a GEP in place under the EC framework.
- **Further clarification of the existing GEP eligibility criterion**, including the mandatory building blocks of GEPs and, for RFOs specifically, clarification of the requirements related to the internal operation of RFOs on the one hand and to the external, applicant-focused requirements on the other.



Our ULTIMATE GOAL is for all to unite behind the common objective to implement inclusive GEPs and to commit to monitoring and evaluating their implementation and impact.

Research and innovation quality through Inclusive Gender Analysis in R&I

Policies for the integration of the gender dimension in R&I ensure that the content of R&I produced is not affected by any gender bias and meets the needs of the entire population. This is an essential requirement for **the credibility and social responsibility of the R&I system**. Thus, integrating sex/gender analysis, where relevant, is:

- A matter of quality of the research/innovation produced.
- A matter of making democratic and effective use of public resources.
- A matter of orienting R&I toward the UN Sustainable Development Goals.

The gender dimension in R&I has been a well-established pillar of gender equality policies in R&I since Horizon 2020, which unfortunately has underperformed. According to She Figures 2021, at the European level, around 1.7% of Horizon 2020 projects integrated a gender dimension; data at the national level is for the most part non-existent. Moreover, only a few countries have concrete policies for the gender dimension in R&I, which means that RFOs lack a clear mandate to advance these measures.

The [GENDERACTIONplus analysis](#) has revealed that:

- There is a **lack of consistent policies and impact evaluation** of the gender dimension in R&I at the RFO, national, and EU levels.
- **An intersectional approach is poorly addressed** in efforts to integrate the gender dimension in R&I.
- **The Innovation and Business Enterprise Sectors are not keeping pace** with public higher education institutions and Research Performing Organisations in terms of the integration of the gender dimension in R&I.

To address these persistent challenges, there is a need for:

- **Coordination mechanisms to be in place among Member States** to ensure that all RFOs integrate a national policy/directive to require inclusive sex/gender analysis in funded research. This applies not only to RFOs that fund research but also to RFOs that fund innovation, which should include the gender dimension as a mandatory element of the quality of the research design in the application phase.
- RFOs in the ERA to progressively **require and assess sex/gender analysis in connection with other grounds of discrimination** and, thus, for funded research to provide further examples of successful projects that integrate an intersectional perspective.
- The innovation-related institutions, including the programmes under Pillar III of Horizon Europe, to systematically require – and inform about – **the gender dimension in innovation actions**.
- **The private sector**, particularly medium-sized and large organisations, to be required to have a **GEP in place under the EC framework that includes the gender dimension in R&I as content area**.



Our **ULTIMATE GOAL** is that national authorities involved in the ERA Forum subgroup, with the support of GENDERACTIONplus policy advice, contribute to advancing the gender dimension in R&I in the next FP and to make the ERA the leading global region in the adoption of policies for the integration of the gender dimension in R&I content from an intersectional perspective.

Dignity, safety, and respect for all as a governance principle for the research community

Ending gender-based violence in ERA institutions is a vital part of creating safe and respectful research communities, as well as strengthening the quality of research and higher education. Past and current policy development in ERA and in RFOs and RPOs on ending gender-based violence is still in its infancy. The overall ERA framework on gender-based violence is slowly gaining influence, albeit not as a generic or integrated form of knowledge or set of practices in core processes and frameworks, such as EU framework programmes.

The [GENDERACTIONplus analysis](#) has revealed that:

- None of the 15 countries or regions participating in the GENDERACTIONplus survey has a national or regional policy against gender-based violence in RFOs in place.
- None of the 15 countries or regions participating in the GENDERACTIONplus survey has a policy against gender-based violence in RPOs in place that includes measures for RFOs.
- **The ERA policy framework lacks a consistent overall structure.** Instead, it is composed of divergent policies targeting different stakeholders with measures and strategies not always coherently aligned.

To address these persistent challenges, there is a need for:

- Setting measures against gender-based violence as a **mandatory requirement for GEPs**.
- Establishing the **high-level adoption of the zero-tolerance Code of Conduct** on GBV in ERA, also specifically targeting national authorities, RFOs, and RPOs.
- Implementing an **ERA support structure** on gender-based violence, including all relevant stakeholders.
- **For RFOs, formulating and implementing a Code of Conduct to mitigate GBV towards applicants.**



Our **ULTIMATE GOAL** is to design and implement inter-institutional accountability for all actors in the EU R&I to ensure that researchers can develop their careers free from all forms of violence by making gender-based violence policy an obligatory feature of GEPs. Of vital importance is

inter-institutional exchange, mutual learning and sharing of practices across the entire R&I system to foster enforcement, responsibility, and collaboration.

Conclusion

The current lack of monitoring of policy development and implementation at national and EU levels weakens the ERA policy agenda. There is an interest of the EU as well as MS to monitor GEP implementation at the national and European levels. This shared interest should be used to develop a coherent monitoring approach.

The overall focus on GEPs should integrate, rather than overshadow, other relevant gender equality issues such as strengthening the gender dimension in R&I content and combating gender-based violence. To make the work on gender equality and GEPs more inclusive, there is a need to include more equality dimensions and develop an intersectional approach. These topics should be mandatory in the GEPs eligibility criterion and be a **focus of national and RFO policies.**

Comprehensive monitoring of policy implementation at the EU level will help to advance the development of coherent monitoring systems at the national level and provide the basis for mutual learning through the identification of good practices. It will also provide incentives for Member States and Associated Countries to develop strategies to use monitoring for policy steering at the national level.

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