

# SUPPORTING GENDER EXPERTISE AMONG NCPs FOR BETTER RESULTS ON INCLUSIVE GENDER ANALYSIS IN R&I IN HORIZON EUROPE<sup>1</sup>

The default requirement that all Horizon Europe proposals in R&I incorporate a gender dimension has presented researchers and NCPs alike with new challenges. The ultimate quality and success of a project proposal can depend entirely on how well-equipped the National Contact Point (NCP) system is. For this reason, some of the recommendations to be found in this position paper include:

- Ensuring researchers and other agents in the Research and Innovation (R&I) system are provided with appropriate expert support **by nominating NCPs with gender expertise to address gender issues** in their countries; effectiveness will be achieved by systematically engaging external expertise.
- **Mainstreaming a gender perspective** in the activities of all thematic NCPs through their contacts within their NCP networks, as well as through meetings and events with the EC.
- Make use of the **GENDERACTIONplus learning activities** and materials on the gender dimension in R&I.

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<sup>1</sup> | This position paper has been developed under WP4 Gender dimension in R&I, Task 4.3 Policy advice, by FECYT and BNSF. These organisations are very grateful to TACR, DLR, ISAS CR and Sergej Možina for their contributions and comments.

## Introduction

Horizon Europe has introduced new requirements for applicants relating to gender: beneficiaries must have Gender Equality Plans (GEPs); a gender dimension must by default form part of R&I proposals; and there must be a gender balance in research teams. This has posed a greater challenge for NCPs, who have to deal with questions relating to gender criteria and, particularly, to integrating a gender dimension into the content of Horizon Europe proposals.

NCPs work in close cooperation with both the European Commission (EC) and researchers and are key stakeholders in helping the Framework Programme to improve its performance in terms of sex/gender analysis from an intersectional perspective. The aim of this position paper is to propose measures to help NCPs to improve inclusive gender analysis in R&I in Horizon Europe. It builds on long-standing discussions on the role of NCPs within the Standing Working Group on Gender in Research and Innovation (SWG GRI)<sup>2</sup> and on the insights that GENDERACTIONplus collected from NCPs about the new challenges they are facing in providing advice on integrating a gender dimension into R&I proposals. All this informs the recommendations presented in this position paper aimed at the EC, NCP systems at MS/AC, NCP thematic networks, and NCPs themselves.

An NCP system that is well-equipped with gender expertise would have an impact on awareness-raising at the national level and on the quality of proposals in terms of their sex/gender analysis. This, in turn, would lead to better results in terms of more proposals integrating a gender dimension into their research and innovation content – using an intersectional perspective where relevant – compared to the previous H2020 Programme.

## How NCPs contribute to the framework programmes

According to the Minimum Standards and Guiding Principles, National Contact Points are support structures that have become an essential component in the implementation of successive Framework Programmes. They provide information and on-the-ground advice to potential applicants and beneficiaries, through the project life cycle. This makes them key intermediaries between the European Union's Framework Programmes and the national R&I communities. They provide information on opportunities offered by the Framework Programmes – and on the programmes' requirements – and support the successful participation of their respective countries in these programmes, which leads to the advancement of science, technology, and innovation in Europe.

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**2** | See, for instance, the recommendation to establish National Contact Points on Gender, Science and Innovation made by the Helsinki Group and the recommendation to strengthen training on gender for NCPS made by the SGW GRI as part of their advice for the 8th Framework Programme: [https://era.gv.at/public/documents/1977/HG\\_response\\_to\\_Green\\_Paper.pdf](https://era.gv.at/public/documents/1977/HG_response_to_Green_Paper.pdf); [https://era.gv.at/public/documents/3699/Report\\_Implementation\\_CC\\_of\\_1\\_Dec\\_2015.pdf](https://era.gv.at/public/documents/3699/Report_Implementation_CC_of_1_Dec_2015.pdf). While the role of NCPs has long been recognised as critical to advance gender issues in the Framework Programmes, the fact that Horizon Europe requires the gender dimension by default makes this demand now imperative.

The basic services that NCPs provide in all countries include offering guidance on choosing relevant topics and explaining their objectives, providing advice and assistance in proposal writing, distributing materials, and more.

One of the new mandates for NCPs in Horizon Europe is to '**[r]aise awareness of the objectives to ensure gender balance in Horizon Europe and of strengthening the link between science and civil society**'.<sup>3</sup> This also makes them the main intermediaries supporting a stronger commitment to gender equality in R&I across Europe and fostering more inclusive, equitable, and innovative research. Currently, there are 1,708 NCPs providing guidance, practical information and assistance on all aspects of participation in Horizon Europe.<sup>4</sup> This is a huge pool of intermediaries between Horizon Europe and the national level that have the potential to strengthen the implementation of the Framework Programmes' cross-cutting objectives.

The European Commission supports NCPs through different activities, as summarised below:

- *Infodays* with thematic NCPs where the policy background behind each Work Programme and its corresponding topics are discussed.
- *Periodic meetings* with thematic NCPs to solve questions, develop materials, and answer FAQs to support NCPs.
- *The Research Enquiry Service* deals with questions about European research, available funding instruments in the field of research, and the validation process of participants in Horizon Europe. While it is available for participants, the Service gives the possibility to identify oneself as a nominated NCP and interact more directly with the EC.
- *Funding for projects that support the thematic networks of NCPs*. While 25 of these projects were implemented under Horizon 2020, there are currently 15 ongoing projects as coordination and support actions that are building capacity, boosting connections, and designing training courses tailored to NCPs.
- *The Horizon Europe NCP Portal* was created for NCPs by the EU-funded project Bridge-2HE, and the project NCP4HE continues this work. The NCP Portal is a one-stop-shop where both NCPs and participants in Horizon Europe can easily find relevant information, resources, and tools developed by the NCP community to supplement the official documentation available in the Funding & Tenders Portal.
- *Horizon Academy*,<sup>5</sup> which is implemented by NCP4HE and integrated in the NCP Portal, aims to design trainings on various topics and for different NCP groups and is responsible for implementing the new e-learning platform.

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**3** | European Commission, 2021. [Minimum Standards and Guiding Principles for Setting Up Systems of National Contact Points under Horizon Europe](#).

**4** | See [National Contact Points for Horizon Europe](#)

**5** | <https://horizoneuropencpportal.eu/academy/participants-he-projects>

The new mandate for NCPs in Horizon Europe is to 'Raise awareness of the objectives of ensuring a gender balance in HE and strengthening the link between science and civil society'

## Gender criteria in Horizon Europe proposals

Gender equality is a cross-cutting principle and objective of the whole Framework Programme: 'The Programme shall ensure the effective promotion of equal opportunities for all and the implementation of gender mainstreaming, including the integration of the gender dimension in R&I content.'<sup>6</sup>

Horizon Europe promotes gender equality measures (gender balance and equal research careers) and research on gender issues in different parts of the Framework Programme. Moreover, there are three transversal criteria relating to gender that apply to all the proposals submitted for funding:



Horizon Europe applicants must have a **Gender Equality Plan** in place to be eligible for funding



The **gender dimension must by default be integrated into the content of R&I** proposals and is evaluated under the 'Excellence' award criterion



A **gender balance** in the research team in charge of a project is an **additional criterion for ex aequo proposals**

<sup>6</sup> | Regulation (EU) 2021/695 of the European Parliament and of the Council of 28 April 2021 Establishing Horizon Europe: <https://eur-lex.europa.eu/legalcontent/EN/TXT/PDF/?uri=CELEX:32021R0695>

## Gender equality plan (GEP)

Horizon Europe calls for proposals with deadlines in 2022 and beyond require that applicant public bodies, research organisations, and higher education institutions from EU Member States and Associated Countries have a GEP or equivalent strategy in place to be eligible for funding.<sup>7</sup>

There are several mandatory process requirements and also five recommended content areas that the EC consider essential factors for gender equality in R&I. Integrating a gender dimension into research and teaching content is one of these recommended areas for beneficiaries' work on gender equality. Thus, GEPs in the field of R&I are called upon to make an important contribution to advance the EU objectives relating to the gender dimension in R&I.

### Recommended GEP content areas



## The gender dimension in R&I

Policies for integrating a gender dimension into R&I have been part of the EC framework for gender equality policies in R&I for more than a decade. The gender dimension in R&I content refers to the use of sex and/or gender analysis – when appropriate – in all phases of a research and innovation project. This means taking into account the biological characteristics that distinguish male, female, and intersex people (sex), and the (changing) social and cultural features that shape what different societies understand by the terms 'masculine' and 'feminine' and the diverse identities of women, men, non-binary, queer and other persons (gender).<sup>8</sup>

Horizon Europe also newly requires that an intersectional approach be incorporated – where relevant – into research proposals in every Pillar of the Horizon Europe Programme. This means that other factors that may intersect with sex/gender in a specific object of study need to be addressed in the research project. These other grounds of inequalities may include racial or ethnic origin, age, socioeconomic status, sexual orientation, and disability.<sup>9</sup> It is only by incorporating these intersections into research and innovation that is possible to understand the complex and unique forms of discrimination that the most vulnerable groups of women experience and thus offer meaningful solutions to – well-con-

<sup>7</sup> | European Commission, Directorate-General for Research and Innovation, *Horizon Europe guidance on gender equality plans*, Publications Office of the European Union, 2021, <https://data.europa.eu/doi/10.2777/876509>

<sup>8</sup> | European Commission, 2020. Factsheet 'Gendered innovations. How inclusive analysis contributes to research and innovation'.

<sup>9</sup> | European Commission, 2020. Factsheet 'Gendered innovations. How inclusive analysis contributes to research and innovation'.



ceived – research problems. Inclusive gender analysis in R&I poses a greater intellectual challenge for researchers in different fields and for the NCPs.

In R&I policies the gender dimension is intended to improve the quality of research and innovation (in the dual sense that it provides a control for bias and can lead to innovation in their research results). Incorporating a gender dimension is also about making democratic and effective use of public resources for research and innovation, since the needs of the entire population are addressed, and at the same time it also brings R&I into closer alignment with the UN SDGs.

The EC has promoted this crucial objective in the gender & science field with different funded initiatives. One of the clear impediments to advancing sex/gender analysis in the content of research and innovation was the lack of examples of R&I projects that successfully integrate a gender dimension in different areas of knowledge. To illustrate this, since 2013 the EC has been issuing the *GENDERED INNOVATIONS* reports, which collect examples of innovative research that integrate sex/gender analysis in different scientific areas. The second edition of this publication (2020) incorporates examples of research that include an intersectional approach.<sup>10</sup>

10 | European Commission, 2020. [Gendered Innovations 2](#)

Facilitating the alignment of agendas and mutual learning among the different MS/AC regarding the gender dimension in R&I policies has been another initiative through which the EC has promoted this policy objective. During the 7<sup>th</sup> Framework Programme, the ERA-NET GENDERNET developed mapping activities and strengthened links among partners that served to build the ERA-NET Cofund GENDER-NET Plus<sup>11</sup> in the framework of Horizon 2020. This project funded 13 transnational research projects on gender and SDGs and further developed the policy advice on the gender dimension in R&I policies. However, this policy area has not yet demonstrated a corresponding impact on the content of R&I projects funded under the Framework Programme: only around 1.7% of all Horizon 2020 projects have integrated the gender dimension.<sup>12</sup>

As for Horizon Europe, according to the rules of participation, the gender dimension in R&I projects is an **award criterion** and needs to be integrated into all topics by default. This is a **mandatory requirement** unless a particular topic states that a sex/gender analysis is not mandatory. In doing this Horizon Europe seeks to move away from a ‘flagging gender topics’ model to a ‘by default’ model, thereby reversing the burden of proof.

The analysis of sex/gender – and, where appropriate, of intersecting grounds of inequalities - in Horizon Europe proposals is evaluated as part of the ‘Excellence’ criterion for Research and Innovation Actions (RIAs) and Innovation Actions (IAs). It is thus considered to be part of the quality of the project’s objectives and an indicator of whether the proposed work is ambitious and goes beyond the state of the art. Proposals are in particular evaluated for the ‘soundness of the proposed methodology, including the underlying concepts, models, assumptions, inter-disciplinary approaches, appropriate consideration of the gender dimension in R&I content, and the quality of open science practices and engagement of citizens, civil society and users where appropriate’.<sup>13</sup>

While the impact of this default requirement in the content of funded projects still needs to be demonstrated in the upcoming gender statistics on the R&I field at the EU level and in the interim evaluation reports of Horizon Europe, it is clear that these requirements have certainly been a trendsetter with an impact on RFOs’ activities at the national level.<sup>14</sup>

## Gender balance

A gender balance among the researchers involved in funded projects is strongly encouraged as a way of increasing women’s participation in R&I and is a factor in prioritising otherwise equally ranked proposals. To demonstrate gender balance, a researchers table is included in Part A of Horizon Europe proposals, where the gender of researchers (woman/man/non-binary) and their role in the project are registered.

11 | <https://gender-net-plus.eu/>

12 | European Commission, 2021. [SheFigures 2021](#)

13 | European Commission, 2022. [Horizon Europe Programme Guide](#)

14 | GENDERACTIONplus Deliverable 4.1 [Benchmarking and assessment report on guidelines for sex/gender analysis](#)

It is important to note that researchers – and evaluators – have traditionally confused gender balance and the gender dimension in R&I explained above, which has often led to erroneous explanations about the composition of research teams in the ‘Excellence’ part of the proposals. In other words, incorporating a gender dimension has been interpreted as achieving a gender balance. The fact that gender balance and gender dimension are sometimes conflated not just in research proposals but also in Gender Equality Plans is a classic problem in the field and a well-known obstacle faced by gender experts and practitioners in RFOs.<sup>15</sup> Thus, NCPs dealing with gender issues have an important role in instructing researchers on how to avoid mixing up gender terms.

While it is true that the specialised literature has suggested that diversity in research teams leads to new and different ideas, approaches, and even solutions to research problems,<sup>16</sup> it is important not to fall into an identitarian argument. In other words, knowledge and expertise on sex/gender analysis does not come from a particular gender identity, even if the experience of gender discrimination, for instance, may give rise to a particular sensitivity and knowledge on some issues. This is why the composition of the research team in terms of gender (number of women, men, and non-binary people) cannot be a proxy for the quality of the integration of the sex/gender categories of analysis in a given research project.

While gender balance as an ex aequo ranking criterion is taken from the table on the number of researchers assigned to a proposal, the gender dimension in R&I is evaluated as part of the ‘Excellence’ criterion, as explained above, so it is crucial not to merge these two aspects when providing advice to researchers.

## The need for gender expertise among NCPs

With the aim of offering support to national NCP systems regarding the gender dimension in R&I content, GENDERACTIONplus conducted a training needs assessment during the summer 2023 through an online survey distributed among a database of around 40 NCPs from MS/AC and third countries interested in joining a potential network of expertise on the topic.

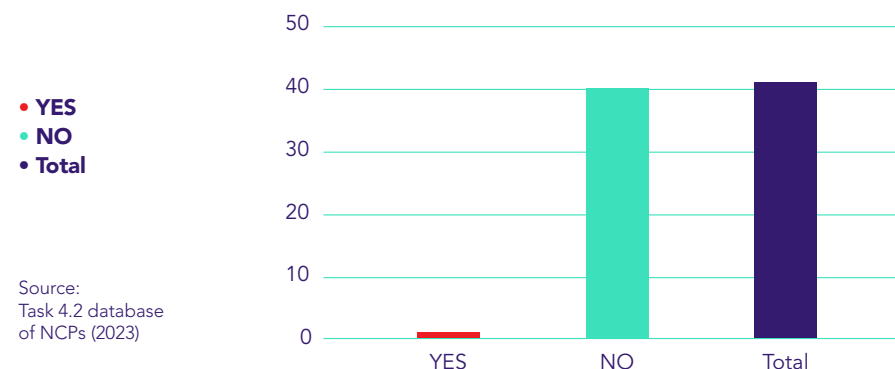
The responses to this survey showed that the vast majority of the sample deal with questions on the gender dimension in the content of the proposals. Previous GENDERACTIONplus reports had shown an increase in the volume of requests received by the NCPs in many countries as a consequence of the new gender-related requirements in Horizon Europe.<sup>17</sup>

<sup>16</sup> | Nielsen, M. W., S. Alegria, L. Börjeson, H. Etkowitz, H. J. Falk-Krzesinski, A. Joshi, E. Leahey, L. Smith-Doerr, A. W. Woolley, L. Schiebinger. 2017. ‘Opinion: Gender diversity leads to better science.’ Proceedings of the National Academy of Sciences 114(8): 1740–1742.

<sup>17</sup> | GENDERACTIONplus Deliverable 6.1 [Benchmarking analysis of monitoring/evaluation of GEPs](#)

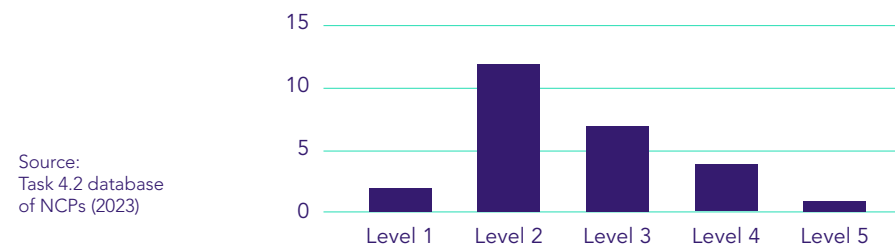
All of this indicates an increased attention to gender issues on the part of applicants and their need for expert support. A corresponding response to this need is however lacking in ERA countries, where gender NCPs are scarce (GENDERACTIONplus has so far only been able to identify three officially appointed<sup>18</sup> gender NCPs from Estonia, Germany and Spain).

### Task 4.2 database: Gender NCPs



When asked about the level of knowledge on the topic of the gender dimension in R&I content, most NCP respondents to the GENDERACTIONplus survey self-assessed their level of knowledge on this issue as low (on a scale of 1 to 5 with 1 being the lowest and 5 being the highest):

### Knowledge on gender dimension in R&I



<sup>18</sup> | Other countries have found alternative paths to provide advice to applicants, such as the Czech Republic where the Centre for Gender and Science at the Czech Academy of Sciences supports the NCP national system through the CZERA project funded by the Ministry of Education, Youth and Sports with the explicit aim of supporting the participation of Czech RPOs in Framework Programmes, and acts as a gender NCP, though without an official appointment.

This means that NCPs are doing their best to cover a complex field of expertise without possessing the extensive knowledge required to do so and with little self-confidence about their performance. Many of the respondents expressed their interest in improving the support NCPs provide to applicants, which also indicates the high level of commitment there is to this among NCPs:



**'Our clients inquire about it and ask practical questions. I do not have any practical experience.'**

**'The gender equality, gender dimension and general gender aspect terms are sometimes not very clear.'**

**'During my interactions with researchers and my NCP colleagues I would like to be able to provide some concrete examples.'**

Thus, both the EC and national NCP structures should undertake actions to promote more expertise among NCPs to help them provide applicants with better advice on sex/gender analysis and intersectionality in the content of R&I proposals.

## How to strengthen the system

National NCP systems should amplify the support they provide to researchers in the adequate integration of the gender dimension into R&I. For this to happen, national NCP structures could begin by identifying some expert NCPs who are willing to collaborate in the GENDERACTIONplus NCP network on the gender dimension in R&I, and they could facilitate and recognise the experts' involvement in training activities relating to the gender dimension in R&I. Gradually improving the capacities of the NCP teams will make the system better prepared for the next Framework Programme.

For those countries that want to have a more concrete impact in the short term, the best option is to start mobilising their existing gender expertise at the national level and to nominate dedicated gender NCPs ready to support the R&I system. The two strategies are not mutually exclusive.

## What role gender NCPs should play

Those few countries that have nominated gender NCPs have used different formulas. A Gender NCP can be either an NCP who has acquired the necessary training and skills on gender issues to provide researchers with quality advice, a gender expert who belongs to gender equality structures in national/regional R&I institutions, or an external gender expert with the necessary experience in the Framework Programme. While there could be some conflict of interest in the case of external gender experts, this could be solved through their rotations as NCPs.

Gender NCPs would take the lead through a 'train the trainer' approach in a shared commitment to '[r]aise awareness of the objectives to ensure gender balance in HE and of strengthening the link between science and civil society'. Specifically, gender NCPs could support the system through, among others, the following activities:

- Raising awareness among researchers of the importance of integrating a gender dimension in Horizon Europe proposals as an R&I quality requirement by using concrete examples from R&I projects in workshops and other training and dissemination activities;
- Raising awareness among thematic NCPs on the gender-related requirements in Horizon Europe and the impact of these aspects on proposals' chances of success;
- Offering institutions guidance on the design and requirements of gender equality plans in the EC framework;
- Promoting gender balance at all levels of Horizon Europe proposals – for example, by recommending diverse research teams, a gender-balanced advisory board composition, and a policy to ensure women's representation in authorship, panels, and communication activities;
- Disseminating information, materials, and news regarding the gender dimension in R&I, intersectionality, gender equality policies at the EU level, a gender balance, and GEPs.
- Joining European networks of gender NCPs for mutual learning and exchange.
- Providing data on the type and number of activities conducted at the national level regarding different gender-related criteria.
- Participating as national experts in different committees involved in the decision-making on ERA policy, by providing concrete information on the needs and interests of the R&I community and gender scholars;
- Supporting national initiatives for amplifying the gender perspective in the R&I system.

For this work to be effective, national NCP systems have to ensure that the work of gender NCPs is mainstreamed into all the activities and messages developed by the whole NCP system. It is imperative that NCPs share the same understanding of gender issues under Horizon Europe in order to avoid contradictory messages being delivered to potential participants in the Framework Programme.

## What NCP networks can do

- Mainstream the use of a gender perspective in the activities they conduct in dedicated Horizon Europe projects that are funded to support NCP networks (e.g. giving visibility to the gender dimension in their respective research areas, inviting gender experts to their meetings/events to promote discussion of the topic, etc.).
- Encourage their NCP network members to follow the upcoming online course on the gender dimension in R&I developed by GENDERACTIONplus through the NCP Academy. A necessary starting point will be for them to collaborate with – and disseminate information from – the GENDERACTIONplus team working on the gender dimension in R&I.



## What MS/AC can do

- Ensure researchers and other agents of the R&I system receive the requisite expert support through the **nomination of gender NCPs** in their countries; as a short-term solution, this can be achieved by systematically drawing on external expertise.
- Encourage all NCPs in their countries to follow the upcoming online course on the gender dimension in R&I developed by GENDERACTIONplus through the NCP Portal.

## What the EC can do

- Advise national NCP structures in MS/AC to nominate gender NCPs, who will ideally be individuals who are dedicated full time to gender as a cross-cutting objective, in preparation for the next Framework Programme.
- Reinforce the mandate for NCPs regarding their contribution to increase awareness on gender balance by explicitly mentioning awareness on the inclusive gender analysis in R&I as well.
- Ensure that Horizon Europe project evaluators are properly briefed on the Horizon Europe approach and project requirements regarding the gender dimension in the content of Horizon Europe proposals and a gender balance in teams.
- Explain the importance of Horizon Europe's gender-related requirements and good practices to thematic NCPs at periodic meetings with them.
- Collect data on nominated gender NCPs and publish it in the Horizon Europe Portal in order to let GENDERACTIONplus monitor progress on the objective of promoting the role of gender NCPs.
- Provide extensive and complete information on the evaluation of the gender dimension in R&I in the interim evaluation report of Horizon Europe so that NCPs have enough arguments and data to improve their advice for applicants. In addition, extract examples of best practice projects and prepare a checklist for NCPs to use in their interactions with potential applicants.
- Support the **establishment of a network of gender NCPs** building on GENDERACTIONplus efforts, considering the need to strengthen the gender dimension in R&I from an intersectional perspective in the upcoming FP10.

Join the  
**GENDERACTIONplus**  
goal of strengthening  
your NCP system with  
gender expertise and tell  
us about your progress  
and challenges at  
[info@genderaction.eu](mailto:info@genderaction.eu)

## + PROJECT INFO

### **Gender Equality Network to Develop ERA Communities To coordinate Inclusive and sustainable policy implementation**

Building on the Horizon 2020 project GENDERACTION, the overall goal of GENDERACTIONplus is to contribute to the coordination of the gender equality and inclusiveness objectives of the new European Research Area (ERA) through the development of two communities of practice (CoPs), one consisting of representatives of national authorities and the second consisting of representatives of Research Funding Organisations. The network is made up of a total of 22 EU Member States (MS) and 3 Associated Countries (AC), as well as 26 project partners and 14 Associated partners.

Adding the plus sign to the title of the previous GENDERACTION project not only indicates that it is a follow-up project but also makes it explicit that this project also addresses diversity and intersectionality (the gender+ approach).

Specifically, the GENDERACTIONplus project aims to:

- Develop strategic policy advice on existing and emerging policy solutions;
- Enhance the policy-making process by engaging with stakeholders, civil society organisations, and citizens;
- Build capacities, competence, and expertise for gender equality and mainstreaming in Research & Innovation among the policy and RFO community members, with special attention to countries with a less comprehensive policy;
- Create an impact through communication, dissemination, and exploitation.

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