

# Sub-Group to the Expert Group ‘ERA Forum’

## ‘INCLUSIVE GENDER EQUALITY IN THE ERA’

### ACTION 5 OF THE ERA POLICY AGENDA 2022-2024

#### POSITION PAPER ON FRAMEWORK PROGRAMME 10

##### PREAMBLE

The Sub-group on Inclusive Gender Equality in the European Research Area<sup>1</sup> is an advisory body of the Commission’s ERA Forum<sup>2</sup> established to support the implementation of Action 5 “Promote Gender Equality and Foster Inclusiveness, Taking Note of the Ljubljana Declaration”. It is comprised of representatives of 22 Member States, 3 Associated Countries and 14 umbrella organisations, and is tasked with facilitating the exchange of experience and promoting mutual learning in ERA Action 5; providing advice and support to the Commission to address policy challenges related to gender equality and inclusiveness in R&I; facilitating coordination and cooperation on ERA Action 5; liaising with national and European stakeholders and networks as well as related projects and actions; and interacting closely with other ERA Policy Agenda actions<sup>3</sup>.

The objective of this position paper from the Sub-group is to review the achievements of the ERA Policy Agenda 2022 – 2024<sup>4</sup>, as embedded in the EU Pact for Research and Innovation and the Ljubljana Declaration for advancing European Research and Innovation, and to outline the vital elements for inclusive gender equality policy going forward to ERA Policy Agenda 2025 – 2027 and Framework Programme 10.

In delivering its recommendations, the Sub-group takes note of the 2024 Letta report *Much More Than A Market*<sup>5</sup> underlying the role of the ‘Fifth Freedom’<sup>6</sup> in delivering a sustainable future and prosperity in the EU; the 2024 Draghi report *The Future of European Competitiveness*<sup>7</sup> underlying the continued gender disparities in skills and training systems; and the 2024 Communication from the Commission on Implementation of European Research Area<sup>8</sup>, highlighting the continued “scope for stronger action to develop inclusive gender

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<sup>1</sup> For more information see <https://ec.europa.eu/transparency/expert-groups-register/screen/expert-groups/consult?lang=en&fromMainGroup=true&groupId=103813>.

<sup>2</sup> For more information see <https://ec.europa.eu/transparency/expert-groups-register/screen/expert-groups/consult?lang=en&groupId=3833>.

<sup>3</sup> For more see <https://ec.europa.eu/transparency/expert-groups-register/core/api/front/expertGroupAdditionalInfo/46609/download>.

<sup>4</sup> European Commission. (2021). European Research Area Policy Agenda – Overview of actions for the period 2022-2024. [Online]. Available at [https://commission.europa.eu/system/files/2021-11/ec\\_rtd\\_era-policy-agenda-2021.pdf](https://commission.europa.eu/system/files/2021-11/ec_rtd_era-policy-agenda-2021.pdf). The document was annexed to General Secretariat of the Council. (2021). Future governance of the European Research Area (ERA) - Council conclusions (14308/21). [Online]. Available at <https://data.consilium.europa.eu/doc/document/ST-14308-2021-INIT/en/pdf>.

<sup>5</sup> Letta, E. (2024). *Much More Than a Market*. [Online]. Available at <https://www.consilium.europa.eu/media/ny3j24sm/much-more-than-a-market-report-by-enrico-letta.pdf>.

<sup>6</sup> The Fifth Freedom “entails embedding research and innovation drivers at the core of the Single Market, thereby fostering an ecosystem where knowledge diffusion propels both economic vitality, societal advancement and cultural enlightenment” (Letta 2024, p. 20).

<sup>7</sup> Draghi, M. (2024). *The Future of European Competitiveness*. [Online]. Available at [https://commission.europa.eu/topics/strengthening-european-competitiveness/eu-competitiveness-looking-ahead\\_en#paragraph\\_47059](https://commission.europa.eu/topics/strengthening-european-competitiveness/eu-competitiveness-looking-ahead_en#paragraph_47059).

<sup>8</sup> European Commission. 2024. COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE

equality plans and policies that address intersecting inequalities and discrimination on the grounds of gender, gender orientation, ethnicity, age, sexual orientation and other aspects". The Sub-group welcomes the recommendations of the 2024 High-Level Expert Group Report *Align, Act, Accelerate*<sup>9</sup> to preserve the actions taken under Horizon Europe, in particular the Gender Equality Plans.

### **Significant advances achieved in Horizon Europe**

Inclusive gender equality in research and innovation (R&I) is a crucial driver of a sustainable research environment that lays the foundation for high standards of the research profession in the European Research Area (ERA) with improved career prospects and working conditions. Without effective measures to promote inclusive gender equality in Europe, research quality and competitiveness suffer, hindering potential scientific advancement and resulting in the loss of valuable talent.

Significant advances have been made in the framework of Horizon Europe with Gender Equality Plans (GEPs) as an eligibility criterion, the gender dimension in the content of R&I as an award criterion by default across the programme, and gender balance as a ranking criterion for ex aequo proposals. Recent analyses confirm that the GEP eligibility criterion has had a catalytic effect<sup>10</sup>.

### **Gender equality, inclusiveness and innovation go hand in hand**

Correlation exists between gender equality and innovation performance. Europe's four Innovation Leaders according to the 2024 Innovation Scoreboard—Sweden, Denmark, Finland, and the Netherlands—are also countries that score the highest in the EU Gender Equality Index. In contrast, the Emerging Innovators are some of the countries with the lowest score on the EU Gender Equality Index (Hungary, Romania, Latvia, Slovakia, Poland).<sup>11</sup> The ability of a country to create more equitable conditions contributes to being able to harness talent. Moreover, considering the gender dimension in both the content and methods of the innovation solutions from an inclusiveness perspective enhances understanding of the needs and priorities of the European population.

### **Bold and committed leadership needed**

In the previous policy cycle, the Commission together with several Member States demonstrated bold and committed leadership in advancing inclusive gender equality, including legislative and policy actions to advance on institutional change through GEPs, combatting gender-based violence (GBV), integrating the gender dimension in R&I content, and

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COMMITTEE OF THE REGIONS Implementation of the European Research Area (ERA) Strengthening Europe's Research and Innovation: The ERA's Journey and Future Direction (COM(2024) 490 final). [Online]. Available at <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2024%3A490%3AFIN>.

<sup>9</sup> European Commission: Directorate-General for Research and Innovation. (2024). *Align, act, accelerate – Research, technology and innovation to boost European competitiveness*. Publications Office of the European Union. [Online]. Available at <https://data.europa.eu/doi/10.2777/9106236>.

<sup>10</sup> European Commission: Directorate-General for Research and Innovation, Pépin, A., Andriescu, M., Buckingham, S., Mounou, A. et al. (2024). *Impact of gender equality plans across the European Research Area – Policy briefs*. Publications Office of the European Union. [Online]. Available at <https://data.europa.eu/doi/10.2777/655676>; European Commission: Directorate-General for Research and Innovation. (2024). *Impact of gender equality plans across the European Research Area*. Publications Office of the European Union. [Online]. Available at <https://data.europa.eu/doi/10.2777/042876>; Knapinska, A., Chrobak-Tatara, M. (2023). *GENDERACTIONplus D6.1: Benchmarking analysis of monitoring / evaluation of GEPs*. [Online]. Zenodo. <https://doi.org/10.5281/zenodo.12798485>.

<sup>11</sup> Wroblewski, A. (2023). *Deliverable 5.1 First report on monitoring ERA action implementation at national level*. GENDERACTIONplus, p. 20.

embracing inclusiveness and the intersectional perspectives. It will continue to require determination and unwavering leadership to address continued issues, in particular the currently poor working conditions in research in some parts of the EU, including a lack of career prospects and opportunities, pay inequality, insufficient social security, and an uncertain future. Gender equality and inclusiveness are core EU values and, to this end, the European R&I ecosystem must continue to advance toward equitable and inclusive research for the future benefit and prosperity of all.

## RECOMMENDATIONS FOR FRAMEWORK PROGRAMME 10

### Gender Equality Provisions

#### 1. Inclusive GEP eligibility criterion

To maintain the progress on gender equality in R&I, it is necessary to preserve the current GEP policy framework as a permanent and integral element of EU research funding requirements. GEPs have already demonstrated their capacity to drive institutional change across Research Performing Organisations (RPOs), particularly in regions with less advanced gender equality policies.<sup>12</sup> By ensuring that GEPs remain an eligibility criterion for research funding, these plans will continue to serve as a foundation for long-term, sustainable improvements in gender equality and inclusiveness within the European R&I ecosystem.

Building upon the existing GEP framework is crucial, with a strong emphasis on developing intersectional and inclusive GEPs. Discrimination in research and innovation extends beyond gender inequality, as gender inequality interacts with other dimensions of discrimination. Substantial research highlights the presence of intersectional discrimination based on factors such as race and ethnic origin, disability, gender, sexual and relationship diversity, and socio-economic status within academia. Incorporating these intersecting factors into GEP requirements, in accordance with national data legislation, will strengthen gender equality efforts and foster a research environment where researchers can achieve their full potential and pursue successful research careers in the ERA, ensuring that research outputs have greater and wider impact at both the societal and EU levels. Particular attention must be given to the conditions of early career researchers, as this group faces globally specific challenges and forms of marginalisation and vulnerability.<sup>13</sup>

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<sup>12</sup> Standing Working Group on Gender in Research and Innovation. (2021). *Report by the ERAC SWG on Gender in Research and Innovation on Gender Equality Plans as a catalyst for change* (ERAC 1202/21). [Online]. Available at <https://data.consilium.europa.eu/doc/document/ST-1202-2021-INIT/en/pdf>; Knapinska, A., Chrobak-Tatara, M. (2023). *GENDERACTIONplus D6.1: Benchmarking analysis of monitoring / evaluation of GEPs*. [Online]. Zenodo. <https://doi.org/10.5281/zenodo.12798485>; European Commission: Directorate-General for Research and Innovation. (2024). *Impact of gender equality plans across the European Research Area*. Publications Office of the European Union. [Online]. Available at <https://data.europa.eu/doi/10.2777/042876>; European Commission (2024). *European Research Area – the new ERA 4 years on: achievements, lessons learnt and the way forward*. Feedback received to the call for evidence. [Online]. Available at [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14384-European-Research-Area-the-new-ERA-4-years-on-achievements-lessons-learnt-and-the-way-forward\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14384-European-Research-Area-the-new-ERA-4-years-on-achievements-lessons-learnt-and-the-way-forward_en).

<sup>13</sup> Eurodoc. (2020). *LGBTQIA Early Career Researchers Need to Enjoy a Safe, Friendly, and Discrimination-Free Atmosphere at Work*. [Online]. Available at <https://eurodoc.net/news/2020/lgbtqia-early-career-researchers-need-to-enjoy-a-safe-friendly-and-discrimination-free>; Kent, B. A., Holman, C., Amoako, E., Antonietti, A., Azam, J. M., Ballhausen, H., Bediako, Y., Belasen, A. M., Carneiro, C. F. D., Chen, Y. C., Compeer, E. B., Connor, C. A. C., Crüwell, S., Debat, H., Dorris, E., Ebrahimi, H., Erlich, J. C., Fernández-Chiappe, F., Fischer, F., Gazda, M. A., ... Weissgerber, T. L. (2022). Recommendations for empowering early career researchers to improve research culture and practice. *PLoS biology*, 20(7), e3001680. <https://doi.org/10.1371/journal.pbio.3001680>; Nobes, A. (2023). *Listening to the voices of early-career researchers in the Global South so that we can better support them to thrive*. International Network for Advancing Science and Policy [Online]. Available at

## 2. Inclusive gender analysis in R&I content

Integrating inclusive gender analysis in R&I content<sup>14</sup> enhances the high standard of quality, rigour and social relevance of research. Public funding expenditures for research and innovation must ensure that all people benefit from the results equitably and that the results of publicly funded research do not instigate or replicate adverse effects or neglect the research needs of some segments of the population. It is necessary to continue closing the gender research data gap by funding research for and about all genders and other marginalised groups. For the R&I concerned, it should be a requirement to report research results with sex/gender-disaggregated data. This requirement for reinforced integration of inclusive gender analysis in R&I content will enhance research integrity, as it is essential to gain the trust of the entire population in research and innovation methods regarding rigor, safety, and ethics. This requirement will support researchers in performing better by exploring creative solutions and intersectional dimensions in their research problems, thus enhancing academic freedom.

To achieve this, it is necessary to mandate that applicants for EU funding under the new Framework Programme incorporate inclusive gender analysis in their proposals, providing a robust and comprehensive rationale when this analysis is deemed irrelevant. Furthermore, this integration should be evaluated by experts on gender and inclusiveness to ensure its adequacy and to provide constructive, meaningful feedback to the research community and EU institutions.

## 3. Involve the Business Enterprise Sector in the gender equality effort

More than half (56.6%) of full-time equivalent researchers in the EU work in the Business Enterprise Sector (BES).<sup>15</sup> Despite improvement in gender balance amongst doctoral graduates, including STEM, this has not translated into employment, with men still more likely than women to be employed as researchers in the BES sector.<sup>16</sup> It is vital to mitigate this continued underrepresentation, reinforce seamless intersectoral mobility and talent retention<sup>17</sup>, ensure a whole sector approach<sup>18</sup> and comparable standards of working conditions in large consortia. Therefore, GEPs should become a requirement for BES applicants for funding under FP10. This will also contribute to the BES sector integrating the inclusive gender analysis into their R&I projects and solutions, thus enhancing the relevance and minimising the risks of R&I results and giving the BES a competitive advantage. To ease the transition and support a learning approach, this requirement can include an on-boarding period similar to the Horizon Europe model for the public sector, where having a transition period has already demonstrated success.

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[https://www.inasp.info/sites/default/files/2023-04/VoECRs%20summary%20report\\_0.pdf](https://www.inasp.info/sites/default/files/2023-04/VoECRs%20summary%20report_0.pdf); Wang, J. Weins, N. Dou, Y. Rana, S. Gaur, T., Shashidharan, N., Kien, P. T. Rai, S., Das, S. (2024). An early career researchers' perspective on inequality in ecosystem services research in Asia. *Environmental Science & Policy*, 156. <https://doi.org/10.1016/j.envsci.2024.103728>.

<sup>14</sup> In line with the Framework for the Integration and Evaluation of an Inclusive Gender Analysis in Research and Innovation Content, developed by the ERA Forum Sub-group on Inclusive Gender Equality in the ERA in 2024, the term "inclusive gender analysis in R&I content" is used to refer to the gender dimension into R&I from an intersectional perspective.

<sup>15</sup> European Commission (2023) *New Eurostat data on researchers employed*. [Online]. Available at <https://ec.europa.eu/newsroom/rtd/items/771168/en>.

<sup>16</sup> European Commission (2021) *She Figures 2021*. Available at <https://op.europa.eu/en/publication-detail/-/publication/67d5a207-4da1-11ec-91ac-01aa75ed71a1>, pp 82.

<sup>17</sup> Letta 2024. Op. cited.

<sup>18</sup> Witt, A., Politis, M., Womersley, K. (2023). A whole sector approach to policy change will accelerate integration of sex and gender in research: *BMJ*; 383. <https://doi.org/10.1136/bmj.p2913>

## **Gender as a Research Topic**

### **1. Gender research**

Gender research from an intersectional perspective is essential for understanding our gendered societies and their development, current societal challenges such as anti-gender discourse in Europe, and identifying solutions.

The requirement of the inclusive gender analysis in R&I proposals by default needs to be complemented with research that takes gender and other inequalities as its main focus in order to move theoretical and methodological frameworks forward. To this end, it is vital to ensure a dedicated funding line for gender-focused research addressing the most pressing societal challenges identified for primary attention in the next Framework Programme including the green and digital transition and health. By supporting this agenda, we can ensure that inclusive gender considerations are not merely an add-on but a fundamental component of transformative research and innovation.

## **Framework Programme 10 Implementation**

### **1. Good and evidence-based policy making through monitoring and evaluation**

Existing gender equality policies under Horizon Europe must remain in place. To ensure their proper implementation and further development, rigorous monitoring and evaluation processes must be put in place and advanced. Monitoring of GEPs at the national level is essential to prevent superficial compliance. Collaborative efforts with Member States should focus on establishing a comprehensive monitoring and evaluation system for inclusive gender policies. These policies must be thoroughly assessed for content and closely monitored for implementation. Addressing this gap is vital for enhancing policy effectiveness and ensuring sustained progress in inclusive gender equality within the research ecosystem.

### **2. Work-life balance and care costs**

Adding provisions that improve work-life balance and address additional care costs is critical for developing inclusive research careers and fostering quality research. There is a pressing need, especially in the European Research Council and Marie Skłodowska-Curie Actions, to extend support to cover care expenses such as costs related to childcare during conferences or research activities outside the location of the host institution. By allowing researchers to claim these expenses, the financial burden on those with caregiving responsibilities can be alleviated, ultimately fostering a research environment that values care and supports researcher-parents and caregivers.

### **3. Safe and inclusive working environments**

The safety and security of researchers must be prioritised to fulfil the promise of the free movement of researchers, scientific knowledge and technology outlined in the Fifth Freedom<sup>19</sup>. To this end, strong protections against all forms of misconduct and in particular GBV directed at women, LGBTQI+ individuals and ethnic minorities and other at-risk groups need to be established, as these groups face heightened risks when travelling to countries with increased levels of homophobia, transphobia, sexism, and racism.

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<sup>19</sup> Letta 2024. Op. cited.

Receiving institutions must implement effective protections and reporting systems to address all forms of GBV in line with the Zero Tolerance Code of Conduct.<sup>20</sup> Without these measures, institutions should not be permitted to host researchers or students, as their safety must be the top priority within the ERA and its global approach to international science, technology and innovation partnerships.

#### 4. Gender expertise at the proposal stage

To enhance the effectiveness of project evaluations, experts must be properly briefed on inclusive gender equality provisions. Currently, this aspect is often glossed over, leading to insufficient attention to this area in project evaluations. This pertains primarily to the inclusive gender analysis in R&I content, particularly in calls where gender and sex analysis is required by default. In addition, this requires involving gender experts in the given field in the evaluation process, to guarantee that gender aspects in proposals are adequately evaluated. Moreover, national NCP structures should be strengthened with gender expertise in order to improve the quality of the proposals submitted to the next Framework Programme.<sup>21</sup>

#### 5. Adequate resourcing for inclusive gender equality

Inclusive gender equality calls consistently receive significantly smaller budgets compared to other funding streams, which undermines their potential impact. If gender equality and inclusiveness is a genuine priority, adequate resources must be allocated to ensure the effective implementation of related policies. Apart from increasing budget allocations for inclusive gender equality topics in the Work Programmes, it is necessary to ensure sufficient and sustained resources, including human resources to ensure the effective implementation of the policies concerned. Given the support among Member States for inclusive gender equality in the ERA Policy Agenda 2022-2024 and its proposed successor, it is vital that Member States' commitment is matched by adequate dedicated funding and personnel in the European Commission.

## CONCLUSION

Prioritising inclusive gender equality provisions in Framework Programme 10 will enhance the competitiveness and sustainability of the ERA. By embedding inclusive gender equality in R&I policies, we maximise the potential of diverse talents, ensuring that Europe remains at the forefront of scientific excellence. Promoting inclusive gender equality serves as a catalyst for innovation, driving creative solutions and enhancing the relevance of R&I outputs. The higher productivity and innovative outcomes produced by diverse teams can translate into potential economic benefits for the EU and an additional competitive edge in the global research environment. Primarily, however, promoting gender equality makes the fundamental values of the EU a reality. Therefore, a steadfast commitment to inclusive gender equality is both a matter of social justice and a strategic investment in the future of research and economic prosperity in Europe.

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<sup>20</sup> European Commission: Directorate-General for Research and Innovation. (2024). *Zero-tolerance code of conduct: counteracting gender-based violence, including sexual harassment, in the EU research and innovation system*. Publications Office of the European Union. [Online]. Available at <https://data.europa.eu/doi/10.2777/044501>.

<sup>21</sup> GENDERACTIONplus. (2024). Position Paper No. 3 SUPPORTING GENDER EXPERTISE AMONG NCPs FOR BETTER RESULTS ON INCLUSIVE GENDER ANALYSIS IN R&I IN HORIZON EUROPE. [Online]. Zenodo. <https://doi.org/10.5281/zenodo.12798864>.