



Project acronym:

**GENDERACTIONplus**

Project title:

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

**Grant agreement No:** 101058093

**Start date of project:** 1 June 2022

**Duration:** 36 months

## **Deliverable 4.3**

### **Report on policy coordination across MS and AC and promising practices to advance the gender dimension in R&I in the ERA**

Due date of the deliverable	31.05.2025
Submission date	30.05.2025
File name	D4.3 – Report on policy coordination across MS and AC and promising practices to advance the gender dimension in R&I in the ERA
Organisation responsible for the deliverable	FECYT
Author(s)	Lydia González Orta
Status	Final
Dissemination level	PU



GENDERACTIONplus is funded by the European Union's Horizon Europe research and innovation programme under grant agreement No. 101058093.

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## DOCUMENT REVISION HISTORY

Revision History			
Version	Date	Modified by	Comments
0.1	23.04.2025	Lydia González - FECYT	First draft
0.2	30. 4. 2025	Marcela Linková – ISAS CR	Comments on the first draft
0.2	12.05.2025	Jörg Muller – Advisory Board	Comments on the first draft by the quality editors
0.3	16.05.2025	Lydia González - FECYT	Implementation of the comments, including additional information
1.0	19.05.2025	Lydia González - FECYT	Version shared with the Consortium
1.1	30.05.2025	Lydia González - FECYT	Comments by the consortium integrated
2.0	30.05.2025	Martina Fucimanová – ISAS CR	Document submission



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## LIST OF ACRONYMS

Abbreviation	Meaning
AC	Associated Countries
BES	Business Enterprise Sector
BNSF	Bulgarian National Science Fund
COARA	Coalition for the Advancement of the Reform of Research Assessment
CoP	Community of Practice
DG RTD	Commission's Directorate-General for Research and Innovation
EIC	European Innovation Council
ERA	European Research Area
FECYT	Spanish Foundation for Science and Technology
FP10	Framework Programme 10
GE	Gender Equality
GEP	Gender Equality Plan
HE	Horizon Europe
HEI	Higher Education Institution
ISAS CR	Institute of Sociology of the Czech Academy of Sciences
MS	EU Member States
NCP	National Contact Point
RFO	Research Funding Organisation
R&I	Research & Innovation
TACR	Technology Agency of the Czech Republic
VA	VETENSKAP & ALLMANHET
WP	Work Package



## EXECUTIVE SUMMARY

Gender dimension in R&I is one of the thematic Work Packages of the GENDERACTIONplus project whose aim is to advance the understanding of the gender dimension in R&I from an intersectional perspective and within the framework of policy coordination across the ERA. The main objective of Task 4.3. was to develop policy advice on the gender dimension in R&I for different ERA stakeholders, and was carried out by FECYT, BNSF and TACR. Task 4.3 team has taken the topic of the “Gender dimension in R&I” and worked to give it a greater visibility and relevance by expanding the means of the policy advice used, the stakeholders invited to engage with the project, and by expanding the concept itself to embrace such an exciting perspective as intersectionality and inclusiveness. Therefore, Task 4.3 team has taken on intellectual, argumentative and political challenges related to the field of “inclusive gender analysis in R&I” policies. The different outputs and achievements of this journey are highlighted in this deliverable report as well as the process followed in each case. Moreover, this report outlines critical reflections of Task 4.3 team by providing lessons learned and conclusions after two years of ongoing activity.



## 1. INTRODUCTION

### 1.1. About the project

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 Research Funding Organisation (RFO) community members, with special attention to countries with a less comprehensive policy;
- Create an impact through communication, dissemination, and exploitation.

Thematically, the project focuses on:

- Intersectionality and inclusiveness
- Gender-based violence
- The gender dimension in research and innovation
- Monitoring and evaluating gender equality actions in the European Research Area (ERA)
- Promoting institutional change through Gender Equality Plans (GEPs)

GENDERACTIONplus aims to achieve the following impacts:

- Advance policy coordination among MS and AC countries and through stakeholder and citizen engagement.
- Improve research careers and working conditions in European R&I, by developing policy dialogue and solutions on inclusion and intersectionality, combating gender-based violence, and promoting institutional changes through GEPs.



- Improve research quality and the social responsibility of knowledge by integrating the gender dimension into research and innovation (R&I).
- Reduce geographic inequality by targeting less experienced/engaged countries and regions.

## 1.2. Objectives of the report

WP4 addresses the need to produce new knowledge and strategic advice on how to consider the gender dimension in R&I from an intersectional perspective in the whole research cycle. Specifically, the aim of Task 4.3. is to produce strategic policy advice to advance the gender dimension in R&I. Thus, Task 4.3 contributes to the achievement of the following WP4 objectives:

- Leverage the content produced on sex/gender analysis<sup>1</sup> across MS and AC
- Develop policy advice on the gender dimension in R&I for different ERA stakeholders
- Liaise with the authorities and institutions involved in the GENDERACTIONplus Communities of Practice
- Increase citizen's and stakeholders' awareness on the gender dimension in R&I as a research quality issue

Deliverable 4.3. reports on the different products and activities of the policy advice developed to accomplish the aim of WP4, that is, enhancing policy coordination across MS and AC to advance the gender dimension in R&I from an intersectional perspective as one of the ERA gender equality and inclusiveness objectives. Task 4.3 started in year 2 of the project, immediately after the completion of Task 4.1. and has been running until the end of the project.

This report builds on the work conducted under Task 4.1. Benchmarking analysis of guidelines on the gender dimension in R&I yet it has evolved in its understanding of the field of sex/gender analysis in R&I content from there. One of the recommendations of Deliverable report 4.1. is to develop clear guidelines and definitions for RFOs in the field of the gender dimension in R&I.

This deliverable report, in turn, is strongly linked to two other work packages in the project and thus, it contributes to their aims and impacts:

- WP1, **Task 1.3 Management and cooperation with the RFO Community of Practice** with which close cooperation has been established on the topic of gender dimension in R&I on demand by the CoP members and CoP coordinator.

<sup>1</sup> "Gender dimension in R&I" and "sex/gender analysis" have been commonly used as synonyms in the EU context, and they were used interchangeably in the Work Package description. However, a detailed explanation of the evolution of these terms can be found in section 4.1. *An evolving field towards inclusiveness.*



- **WP 6 Advancing institutional change through GEPs**, since the gender dimension in R&I is one of the recommended content areas for GEPs as an eligibility criterion for HE beneficiaries and WP4 policy advice has frequently mentioned the GEP criterion.
- **WP8 Creating impact through policy transfer and citizen engagement** by establishing the synergies with key stakeholders around the gender dimension in R&I, organising the discussions and providing the content to be disseminated through project channels, and presenting the results in different events.

The report comprises three main parts corresponding to three relevant aspects to understand the approach and evolution of WP4 from the proposal stage to the end of the project: (i) the procedure followed to achieve Task 4.3 goals; (ii) a description of the variety of stakeholders and ideas mobilised; (iii) the intellectual and policy challenges faced by the field, being the analytical part of the report. The Deliverable ends with some conclusions and recommendations after three years of policy advice in the topic of gender dimension in R&I content. This report may therefore be useful for the following stakeholders:

- The Gender Sector of the DG RTD
- ERA Forum Action 5 Subgroup representatives
- Research Funding Organisations of the ERA
- Horizon Europe National Contact Points (NCPs) and R&I institutions from new Associated Countries
- EU funded projects on gender & science (sister projects)
- EU funded projects providing policy advice in the ERA

## 2. TASK 4.3 ACTIVITIES AND PROCESS

### 2.1. Target groups

The main aim of developing policy advice to enhance coordination in the field of the gender dimension in R&I has been to disseminate the results and recommendations among key stakeholders, as follows:

- At **EU level**, there has been a close cooperation with the Gender Sector of the DG RTD and the ERA Forum Sub-group on Gender Equality and Inclusiveness representatives, including MS, AC, and umbrella organisations. In some activities of the project, contacts have been established with members of the CoARA working groups on the topic.

- At **consortium level**, although all beneficiaries and associated institutions have benefited from the activities offered and outputs produced in WP4 and have engaged in discussions and feedback collection, a more intense cooperation on the topic of WP4 has





taken place with Vinnova and Joanneum Research as coordinators of the RFO CoP and with VA (VETENSKAP & ALLMANHET) for stakeholder engagement activities. Indeed, a close collaboration was established since the beginning with partners involved in Task 4.3 (BNSF and TACR) and with the coordinator of the project (ISAS CR).

- Synergies with **EU-funded projects** have consisted of ad hoc discussions with members of the INSPIRE project on the concept of “inclusive gender analysis in R&I” and occasional cooperation with the Inspiring ERA project.

- Specific collaborations have been established with different **R&I institutions outside the consortium**, sometimes on the basis of an invitation from WP4 to participate in a workshop, sometimes as an invitation received by WP4 leader to participate in an event independent of the project.

**Table 1. Targets groups addressed in Task 4.3**

## EU level



## Consortium level



## EU funded projects



## R&I organisations



## 2.2. Means of policy advice

Policy advice can be defined as the production of knowledge that is relevant for addressing a policy problem and offering recommendations regarding possible solutions.<sup>2</sup> For GENDERACTIONplus it is important to produce rigorous policy advice acknowledging the impossibility of detaching oneself from values. Thus, EU core values, and particularly gender equality, are at the centre of the policy advice produced by GENDERACTIONplus and are explicitly defended.

The preceding GENDERACTION project acquired some experience in providing policy advice during the negotiations of the Horizon Europe programme. Building on this previous experience, the GENDERACTIONplus project has expanded the policy advice by making it more specialised in terms of topics, targets to be addressed and diversity of means. As for WP4 on Gender dimension in R&I, the team in charge of developing policy advice has used the following formats according to the target and objectives in each case:

- **Position papers:** a tangible way of expressing the ideas developed and agreed within the consortium. Having position papers publicly available allowed the ERA stakeholders to analyse the evolution of the policy framework to promote gender equality policies at EU level and let capture the critical debates in each political moment.
- **Mutual learning activities with CoPs:** this is a live and informal way of providing policy advice to the main stakeholders in the project, i.e. national authorities and RFOs in their correspondent CoPs. This format allowed WP leaders to transmit the main recommendations resulting from their work and receive feedback and proposals from project partners.
- **Workshops to engage with stakeholders outside the consortium:** live sessions to debate and collect new ideas on the topics under discussion have been one of the ways to boost stakeholder engagement in WP4. This has been conducted after a careful selection of relevant actors in order to achieve the objectives of the session.
- **Evidence-based policy papers:** research techniques are used in this modality, since solid evidence is needed to expand the knowledge of the consortium in a concrete topic. Both desk

<sup>2</sup> See Maria Tullia Galanti (2022). Policy Advice. In: Harris, P., Bitonti, A., Fleisher, C.S., Binderkrantz, A.S. (eds) The Palgrave Encyclopedia of Interest Groups, Lobbying and Public Affairs. Palgrave Macmillan, Cham. [https://doi.org/10.1007/978-3-030-44556-0\\_118](https://doi.org/10.1007/978-3-030-44556-0_118)

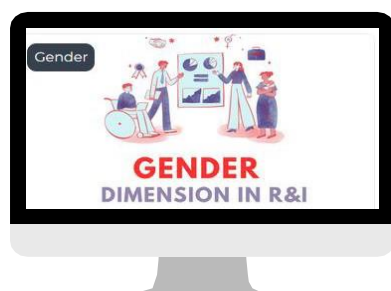
research and qualitative interviews have been conducted to explore resistant discourses around the gender dimension in R&I.

- **Synergies with ERA groups and stakeholders:** one of the most direct forms to boost policy coordination and alignment of agendas in the field consists of engaging with the already established ERA expert groups. Synergies with the ERA Forum Sub-group on Gender Equality and Inclusiveness during the last year of the project facilitated the work of WP4.

## 3. MOBILISING STAKEHOLDERS AND IDEAS

### 3.1. The role of NCPs

National Contact Points (NCPs) were one of the key stakeholders pointed out by WP4 as key players for the success of Horizon Europe measures to mainstream a sex/gender analysis in the content of the R&I proposals as part of the Excellence evaluation criterion. While the main outputs of the work related to NCPs were already reported in Deliverable 4.2, the WP4 team considered that recommendations at the EC level and NCP national structures level should be disseminated by the project in order to fulfil its objectives. Therefore, the first Position Paper



under Task 4.3. focused on “Supporting gender expertise among NCPs for better results on inclusive gender analysis in R&I in Horizon Europe”.<sup>3</sup>

One of the lessons learned from Task 4.2 “Mobilisation of national expertise to support NCPs” was that NCPs were often doing their best to cover the field of sex/gender analysis without the necessary knowledge and capacity for that. Little self-confidence about their performance in solving doubts

regarding these topics was expressed as well. This means the recognition of the gender dimension in R&I as a complex field of expertise that require further support. Therefore, Position Paper no. 3 called for well-equipped NCP systems in terms of gender expertise. Two strategies were suggested for that:

- (i) improving the capacities of the NCP teams by making use of the GENDERACTIONplus resources; and
- (ii) nominating dedicated gender NCPs ready to support the national NCP system.

For this last option, WP4 suggested a list of activities that could be part of the portfolio of activities of gender NCPs based on the experience of the few MS that count on this role. Moreover, different recommendations targeted NCP networks and the EC to encourage the

<sup>3</sup> See [https://genderaction.eu/wp-content/uploads/2024/02/Position-Paper\\_Support-gender-expertise-among-NCPs.pdf](https://genderaction.eu/wp-content/uploads/2024/02/Position-Paper_Support-gender-expertise-among-NCPs.pdf)



professionalisation of the role of gender NCPs in order to have an impact on awareness-raising and on the quality of HE proposals in terms of their inclusive gender analysis.

### 3.2. Towards the 10th Framework Programme (FP10)

A workshop on Inclusive Gender Analysis in R&I Beyond the ERA was organised on 1 October 2024 with the collaboration from BNSF, FECYT, TACR and VA.<sup>4</sup> This stakeholder engagement activity was aimed at seeking novel ideas for the upcoming FP10 as well as learning from the most experienced funding agencies in the field. Acknowledging the role as referents played in the promotion of these policies, two institutions from Canada and the US that fund health research were invited to participate. The Gender Sector of the DG RTD and US and Canadian RFOs gave presentations during the workshop along with other funding agencies of the ERA. The invitations as leading institutions was an exercise of identification of promising practices in the implementation of inclusive gender analysis in R&I policies:



Two main topics were addressed both in the presentations and group discussions: 1) the difficulties of making intersectionality operational and how 2) to achieve a higher policy uptake through awareness-raising on the topic at RFO level. The discussions held during the workshop and the conclusions drawn by WP4 team were reflected in Position Paper no. 8. “Driving forward inclusive gender analysis in R&I policies. Recommendations for Framework Programme 10”.<sup>5</sup> Current challenges for the participant RFOs, such as the different policy contexts and support from the hierarchy, terminological and intellectual issues, and emerging resistances, were highlighted. The recommendations for the upcoming FP10 referred to inclusive gender analysis indicators, communication strategies, the evaluation process, policy coordination and financial instruments, among others. The aim of these recommendations is to support the (upcoming) Framework Programme to maintain its role of trendsetter for RFOs when it comes to sex/gender analysis and intersectional perspective. This Position Paper was circulated among the attendees to the workshop beforehand to collect their feedback.

<sup>4</sup> See <https://genderaction.eu/events/eu-genderactionplus-hosts-stakeholder-consultation-on-inclusive-gender-analysis-in-research-and-innovation/>

<sup>5</sup> See [https://genderaction.eu/wp-content/uploads/2025/02/GENDERACTIONplus\\_Position-Paper-8\\_Driving-Forward-Inclusive-Gender-Analysis-in-RI-Policies.pdf](https://genderaction.eu/wp-content/uploads/2025/02/GENDERACTIONplus_Position-Paper-8_Driving-Forward-Inclusive-Gender-Analysis-in-RI-Policies.pdf)

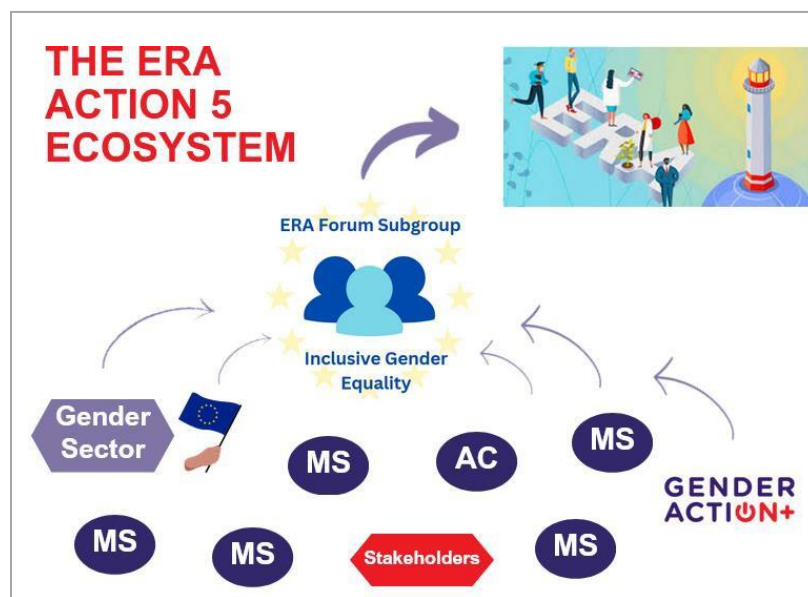


## 3.3. ERA Action 5

The ERA Policy Agenda 2022-2024<sup>6</sup> included the ERA Action 5 “Promote gender Equality and Foster inclusiveness” with four expected outcomes. The last one referred to the gender dimension in R&I as follows:

- *Develop a policy coordination mechanism to support all aspects of gender equality through **inclusive Gender Equality Plans** and policies[...];*
- *Strategy to counteract **gender-based violence including sexual harassment** in the European R&I system[...];*
- *A policy approach to strengthen gender equality, that addresses gender mainstreaming to advance the new ERA;*
- *Develop principles for the integration and evaluation of the **gender perspective in research and innovation content** in cooperation with national RFOs*

Image 1. Composition of the ERA Action 5 Subgroup



In order to produce the “principles for the integration and evaluation of the gender perspective in research and innovation”, a dedicated task force was created at the ERA Forum Sub-group on Gender Equality and Inclusiveness under the coordination of the Gender Sector of the DG RTD, GENDERACTIONplus WP4 leader and the RFO CoP leader in the project. The task

<sup>6</sup> See [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)



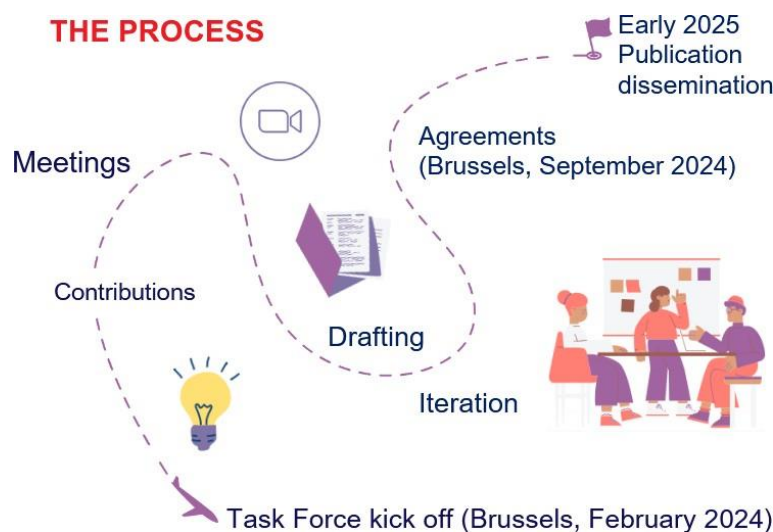
force was composed of seven MS/AC representatives, three umbrella organisations and the Gender Sector of the DG RTD.

WP 4 provided policy advice and mobilized expertise among different actors of the “ERA Action 5 ecosystem”, such as MS/AC representatives and umbrella organisations with the ultimate goal of advancing the ERA Policy Agenda.

The work of the Task Force included meetings, drafting, collecting contributions, integrating comments, presenting concepts and ideas to the whole Sub-group and producing dissemination materials. The Task Force completed the document called “Framework for the Integration and evaluation of an Inclusive Gender Analysis in R&I Content” (hereafter, the Framework)<sup>7</sup> during June and October 2024.

The aim of the Framework is to provide guidance to national authorities and research and innovation funding organisations on policy measures to ensure the effective implementation and evaluation of the integration of the gender dimension in R&I content from an intersectional perspective.

**Image 2. The path towards the development of the Framework**



<sup>7</sup> See <https://op.europa.eu/en/publication-detail/-/publication/42fc7b39-f8b0-11ef-b7db-01aa75ed71a1/language-en>





The Task Force identified several areas of concern in the advancement of inclusive gender analysis in R&I policies that should be addressed in a coordinated manner:

- |  |   |  |   |
|--|---|--|---|
| • The lack of mandate at national level                        |  | • The need to be equipped with proper indicators |  |
| • The need for comprehensive policies                          |  | • Having the BES sector on board                 |  |
| • Dealing with a variety of questions in application templates |  | • Research assessment reform of quality          |  |

The principles agreed among the ERA Forum Sub-group members in order to overcome the main gaps and concerns identified go from terminological aspects to quality standards of these policies at RFO level and policy orientation at national level. For instance, the principle “A whole sector approach through national guidelines” acknowledges the potential of having national mandates in place to promote an inclusive gender analysis in R&I and the need to involve all key actors of the ecosystem – national authorities for R&I, HEIs, scientific journals and the BES - for a greater impact and accelerated change. The seven principles developed in detail in the Framework are as follows:

- |   |   |   |   |
|---|---|---|---|
| • Embrace an Inclusive Gender Analysis                |  | • Enhance capacities to increase creativity in knowledge production |  |
| • A whole sector approach through national guidelines |  | • Inclusive research content assessment                             |  |

- Effective monitoring and evaluation towards qualitative, long-term impact
- Consistency and comprehensiveness of RFO policies
- Harmonising procedures among RFOs to facilitate the work of the R&I community



In order to facilitate the work of R&I institutions towards the implementation of the principles included in the Framework, three infographics were developed for the general public as annexes to the document:

- a brief explanation of the concept “inclusive gender analysis in R&I”;
- a guide with ideas for RFOs on how to integrate an inclusive gender analysis perspective in every phase of the funding cycle;
- a framework on how to evaluate an inclusive gender analysis in R&I funded step by step from a quantitative and a qualitative perspective.

These tools are aimed at supporting R&I institutions, and RFOs in particular, in assessing how the inclusive gender analysis contributed to the scientific, social or economic impact of the R&I funded.

The ERA Action 5 Sub-group representatives fully endorsed the principles of the Framework and by doing this, they:

- recognised that renewed, joint efforts are needed to make the most of this field of gender equality policies in R&I;
- noted that the field of Inclusive Gender Analysis in R&I policies is evolving in a context marked by important societal challenges, such as climate change and Artificial Intelligence;
- called on the support from national authorities and RFOs to implement them;
- urged to continue dedicating efforts in the ERA within ERA Policy Agenda 2025- 2027 and beyond.

The great value of the Framework is being able to set common principles in the ERA to advance the field of the gender dimension in R&I and for this reason it is an important contribution of WP4 to policy coordination among MS/AC, RFOs and umbrella organisations, in synergies with the ERA Forum Subgroup on Gender Equality and Inclusiveness.





### 3.4. Dissemination of policy advice

Once the benchmarking report (Deliverable 4.1) was published at the end of Reporting Period 1, WP4 has been adopting an open and active approach to the dissemination of WP4 outputs among key stakeholders.

#### *Within the consortium:*

- Policy CoP Meeting (15 November 2023): WP4 leader was invited to present the results of the Benchmarking analysis conducted in Task 4.1 in order to collect ideas for the subsequent policy advice in WP4 among the national authorities involved in the policy CoP.
- RFO CoP Meeting (29 February 2024): WP4 leader was invited to participate in one of the periodic RFO CoP meetings to discuss with the institutions involved about the SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis on gender dimension in R&I policies presented at the Mid-term Conference of the project and collect feedback.
- RFO CoP Meeting (11 February 2024): WP4 leader was invited to present in Brussels the “Framework for the integration and evaluation of an inclusive gender analysis in R&I” and discuss its principles with the RFOs involved in the CoP as well as with a representative of the CoARA working groups.
- RFO CoP Meeting (24 April 2025): TACR presented the guideline for RFOs and national authorities “Addressing Resistances to Policies Promoting Sex/Gender Analysis in Research and Innovation Content” developed as part of Task 4.3, and discussed the recommendations with project partners.
- RFO Mutual Learning Workshop (30 April 2025): As a culmination of the work with the RFO CoP conducted through the lifetime of the project, WP4 leader was invited to present the results of WP4 at the last RFO Mutual Learning Workshop on 30 April 2025. This MLW took place at the time of finalising this report.

#### *Outside the consortium:*

- Panel on “The Future of Research Assessment with a focus on an inclusive gender analysis in research and innovation content” at the Final Conference of the GENDERACTIONplus project (12 February 2025): the objective of this session was to take stock of where we are in the debates and actions regarding the reform of research assessment. Moreover, this panel aimed at stressing the idea that an inclusive gender analysis in R&I should be part of research content assessment. WP4 leader



coordinated this panel where experts from 5 different institutions and countries participated in the discussion.



- Women's Health Network of the Medicon Valley Alliance (Sweden-Denmark): the event held in Lund on 10 April 2025, included a presentation of the Framework to Integrate and Evaluate an Inclusive Gender Analysis in R&I Content by the WP4 leader and the participation in a panel discussion on women's health and research by the RFO CoP leader Sophia Ivarsson.



- Workshop on Inclusive Gender Analysis in collaboration with the Inspiring ERA project (28 May 2025): as a proposal by the Gender Sector of the DG RTD and in collaboration with the funded project INSPIRING ERA, a workshop to present the results of WP4 will be organised after the submission of this report. The results of the workshop will be presented during the final project review meeting.

Moreover, several communication activities through the project website and social media campaigns have been conducted by WP8 making use of WP4 outputs. These activities address a general public and are reported under WP8 Deliverables.



## 4. CHALLENGES FOR THE FIELD

WP4 has had to address two main challenges during the lifetime of the project that are at the same time policy and intellectual challenges. The first one is an intrinsic challenge of the field itself since the opening of gender equality policies to intersectional aspects beyond sex/gender has posed some terminological issues. The second one refers to the particular resistances that this field is exposed to and that show how this topic is subject to “external” changes in the policy landscape.

### 4.1. An evolving field towards inclusiveness

The opening of gender equality policies to intersectional aspects had been identified as a challenge in this WP but no proposal had been put forward to address it until the last year of the project. The fact that both the former GENDERACTION project and the GENDERACTIONplus proposal used the term “gender dimension in R&I” for the description of the respective tasks and work packages illustrates how quickly the field has evolved in just a few years.

The “Benchmarking report on guidelines and policies for sex/gender analysis in EU Member States and Associated Countries” (Deliverable 4.1)<sup>8</sup> already highlighted the limited focus on the issues of inclusiveness/intersectionality both in national strategies and RFO policies. The lack of a unified term to refer to the intersectional approach was also pointed out as well as the risk of misunderstanding around of this terminology and of simplification of its full meaning.

Then, Deliverable 4.2. “Assessment report on the national expertise mobilised to support National Contact Points”<sup>9</sup> addressed this issue in its “clarification of concepts” recognising the current process of revision of the gender dimension in R&I in light of the most recent discussions on intersectionality, both from the academic and the policy side. The need to mainstream an intersectional perspective in all EU policies according to the EU Gender Equality Strategy 2020-2025 had posed a challenge in relation to terminology. In this sense, common terms that were used as synonymous in the ERA context such as “gender dimension in R&I” and “sex/gender analysis” had to be reconsidered.

An important step in this regard was the output of the ERA Action 5 “Framework for the Integration and Evaluation of an Inclusive Gender Analysis in R&I Content” (hereafter, the Framework). A particular effort was made to provide clear guidelines with definitions, as

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<sup>8</sup> See [https://genderaction.eu/wp-content/uploads/2023/06/101058093\\_GENDERACTIONplus\\_D4.1\\_Benchmarking-and-assessment-report-on-guidelines-for-sex-gender-analysis.pdf](https://genderaction.eu/wp-content/uploads/2023/06/101058093_GENDERACTIONplus_D4.1_Benchmarking-and-assessment-report-on-guidelines-for-sex-gender-analysis.pdf)

<sup>9</sup> See [https://genderaction.eu/wp-content/uploads/2024/02/Position-Paper\\_Support-gender-expertise-among-NCPs.pdf](https://genderaction.eu/wp-content/uploads/2024/02/Position-Paper_Support-gender-expertise-among-NCPs.pdf)



recommended by Deliverable 4.1. itself, in order to avoid confusion in a complex jumble of concepts that are used everywhere all at once:

- The ***gender dimension in R&I*** and ***sex/gender analysis*** have been used as synonyms in EU policy on gender equality in R&I. Both terms have referred to the use of sex and/or gender aspects – when appropriate – in all phases of a R&I project. This means taking into account the biological characteristics (sex) of women, men and intersex persons and the – changing – social and cultural features (gender) of women, men and non-binary and transgender people.
- ***Intersectionality*** describes overlapping or interdependent systems of discrimination related to age, disabilities, ethnicity, gender, geographical location, sex, socioeconomic status, sexuality, etc. Thus, expressions that have appeared in policy documents, such as sex, gender and intersectional analysis and gender dimension in R&I from an intersectional perspective, try to reflect this new approach towards intersectionality.
- ***Inclusive*** research relates to the integration of diverse perspectives and experiences into R&I, to ensure that the design, implementation and outcomes reflect the needs/perspectives of different groups. Inclusive research has clear added value in that all individuals, regardless of their socioeconomic status, ethnicity, age, social background, (dis)ability, sex or gender, are considered throughout the research process, from design to data collection and analysis and dissemination of the results.<sup>10</sup>

<sup>10</sup> Although in the context of ERA Action 5 and the Framework, the term “inclusive” refers to gender and other social grounds of discrimination, in the broader context of the ERA the EC uses “inclusive” as an umbrella term to refer to widening/geographical inclusiveness and inter-sectoral aspects, so it is important to consider the context in which the term is used.



Therefore, the Framework proposes the term “***inclusive gender analysis in R&I content***” to introduce inclusiveness aspects in research and innovation projects in addition to the intersectional perspective, and taking advantage of the recognition of the term inclusiveness in the ERA Policy Agenda 2022-2024.

According to the Framework, an “Inclusive gender analysis in R&I” comprises the following aspects:

- Sex/gender analysis in the content of R&I throughout the whole R&I project
- Other Intersectional factors of inequality that may intersect with sex/gender in a given object of study
- Including diverse target groups and end-users in co-creation methods and innovation projects including all steps and techniques of the innovation process

## WHAT DOES INCLUSIVE GENDER ANALYSIS IN R&I MEAN?

A FRAMEWORK TOWARDS INCLUSIVE GENDER ANALYSIS IN R&I

### INCLUSIVE GENDER ANALYSIS IN R&I



Sex/gender analysis in the content of R&I throughout the whole R&I project and the whole R&I funding process



Intersectional factors of inequality that may be intersecting with sex/gender in the object of study



Including diverse target groups and end users in research and innovation projects

The dissemination materials designed as annexes to the Framework are targeting non-specialist audiences in order to facilitate the translation of academic discussions on gender studies to the policy field and R&I environments. In this sense, the infographics provide arguments to embrace an inclusive gender analysis in R&I as follows:

- We acknowledge the limitations and blind spots of applying solely a sex/gender approach.
- We embrace the European Commission framework of intersectionality as a principle of R&I policies.
- We echo academic debates on gender issues and bring them to the policy design.
- We promote the involvement of citizens, patients and users of all genders in the development of new knowledge and solutions.

One of the greatest assets of the Framework is to go beyond the classical approach in the field, i.e. focused on sex/gender, with the support of the whole ERA Forum Sub-group representatives. The other greatest asset is to have been able to bring all Sub-group members together on the same common principles, including the necessary “whole sector approach through national guidelines”, as stated above in section 3.3. Thus, the Framework constitutes





an important foundation for the work towards inclusiveness that may inspire R&I institutions to adopt an “inclusive gender analysis” approach and concept.

However, terminological complexities did not end here. To give two examples of the remaining challenge posed by the reality of the implementation of these policies in the face of significant advancement at theoretical and policy conceptualisation levels:

- The Workshop on Inclusive Gender Analysis in R&I Beyond the ERA faced difficulties to discuss intersectionality and inclusiveness because the few RFOs that work from an intersectional perspective still do so at a declarative level and use a variety of terms. Position Paper no. 8 acknowledges this view of intersectionality as a challenging issue for funding agencies.
- Guideline “Addressing resistances to policies promoting sex/gender analysis in R&I content” (in the process of publication at the time of writing this report) makes use of the term sex/gender analysis in R&I when giving an account of current policies at RFOs because only a minority of them are currently working with intersectional aspects.

## 4.2. Renewed resistances

Resistances against gender equality policies, including policies to integrate sex/gender analysis among funding organisations, has been part of the concerns of the project as a whole. Not surprisingly, one of the consortium meetings was dedicated to resistances (Madrid, June 2024) and the capacity-building was highly appreciated by members of the consortium. Taking note of these discussions, WP4 team had the intuition that resistances to sex/gender analysis have some commonalities with resistances to gender equality in general and specific traits. It is worth remembering that the questioning of sex/gender analysis goes directly to the backbone of our understanding of the *construction* of scientific knowledge.

This discussion was briefly introduced in Position Paper on FP10, which highlighted the resistance to Inclusive Gender Analysis in R&I due to perceptions of it being an additional burden. Indeed, recent discourse at EU level calling for simplification in view of FP10 had particularly targeted issues of Responsible Research and Innovation, such as gender equality and sex/gender analysis from an intersectional perspective. Against this line of argumentation, WP4 advocated for embracing the complexity of addressing sex, gender and inclusiveness aspects in research content through curiosity and creativity.<sup>11</sup>

Then, WP4 team decided to go deeper and continue investigating the roots and means of resistant discourse and practice against sex/gender analysis in R&I content as a less explored issue compared to other gender equality domains. For this purpose, interviews and group

<sup>11</sup> See [https://genderaction.eu/wp-content/uploads/2025/02/GENDERACTIONplus\\_Position-Paper-8\\_Driving-Forward-Inclusive-Gender-Analysis-in-RI-Policies.pdf](https://genderaction.eu/wp-content/uploads/2025/02/GENDERACTIONplus_Position-Paper-8_Driving-Forward-Inclusive-Gender-Analysis-in-RI-Policies.pdf)



discussions with representatives of RFOs and national authorities in the consortium were conducted, as well as with experts who promote these policies in R&I institutions. The arguments of resistances collected in a guideline “Addressing resistances to policies promoting sex/gender analysis in R&I content” include:

- Resistances to sex/gender analysis as part of more general anti-gender attitudes
- Understanding the requirement to conduct sex/gender analysis as an attack on freedom of scientific research
- Questioning the positive impact of incorporating a sex/gender analysis on the quality of research
- Arguing that sex/gender analysis is of marginal relevance for most scientific fields and topics
- Pointing to the increased burden placed on researchers, evaluators, and RFOs
- Sex/gender analysis as a tick-box exercise with no real impact
- Arguing that sex/gender analysis is too narrow a focus given the other societal needs that could be addressed
- Referring to the implications of integrating a sex/gender analysis on the number of research subjects and costs of research

The identification and categorisation of the most common arguments of resistance to the topic of integrating an inclusive gender analysis in R&I content is a useful task to let the gender & science community at ERA level think about potential counterarguments and key messages for institutional communication strategies. For instance, WP4 has provided some argumentation lines to question the idea that inclusive gender analysis requirements undermine freedom of scientific research:

- Point out that the aim of measures to promote the integration of gender analysis is not to influence the subject of the research or its objectives, but to support methodological soundness and to ensure that attention is paid to the possible diversity of the end users of the results or those affected by them.
- Highlight other factors that inevitably influence research – from the political prioritisation of certain issues, such as economic growth or sustainability, to national research evaluation criteria, the focus of research funding programmes or their evaluation criteria.
- Mention also other pillars of research governance such as standards for ethical conduct, scientific integrity and rigour that aim to ensure the validity and reliability of findings, maintain public trust and maximize societal benefits.

This latter issue will require further discussion in the future, since discussions at the EU level on the freedom of scientific research began to take shape in the final phase of the GENDERACTIONplus project.



## 5. CONCLUSIONS AND RECOMMENDATIONS

WP4 Gender dimension in R&I has been actively providing policy advice and support to a variety of actors and stakeholders within and beyond the GENDERACTIONplus consortium. This openness to go beyond the strict task description in the project is one of the hallmarks of WP4. During this process, institutions involved in WP4 have learned several lessons for the future and have drawn some conclusions:

- ***A good assessment of the political moment.*** The ERA Forum Sub-group on Gender Equality and Inclusiveness itself noted that “the field of Inclusive Gender Analysis in R&I Content is evolving in a context marked by important societal challenges that have not yet received the necessary attention”<sup>12</sup> in relation to the challenges posed by the green and digital transitions. Both the unprecedented climate crisis and the potential biases of Artificial Intelligence developments require an inclusive gender analysis into their content and a common approach in the ERA as global issues.
- ***Flexibility to adapt to new needs during the lifetime of the project.*** Both the selection of topics addressed in WP4 and the timeline were flexible since the beginning of Task 4.3 (year 2 of the project). This has allowed WP4 team to introduce subjects that were not originally intended, like resistances, and the ERA ecosystem to benefit from the support of the project.
- ***Openness towards the engagement with a diversity of actors.*** Compared to the experience with the policy advice conducted in former GENDERACTION project, policy advice under WP4 has expanded the targets of its policy advice, even beyond ERA institutions, thus enriching the discussion on the topics.
- ***Policy advice can take many forms and a good combination of them is optimal.*** Similarly, WP4 has diversified the means and formats of its policy advice compared to former GENDERACTION project, thus providing more dynamic outputs.
- ***Bringing concepts down to the ground and clear, practical guidance.*** WP4 team has been very aware of its role and place in the “ERA Action 5 ecosystem” and the actors it serves. GENDERACTIONplus is a policy coordination action whose aim is to bring the message to all ERA institutions, whether they have more or less experience and knowledge on gender issues. This is the reason why WP4 products stand out for their simple language, visual and accessible style without compromising rigour and evidence-base.
- ***Leave room for different ideas and creativity.*** While acknowledging the former recommendation of providing practical guidance based on the needs expressed by

<sup>12</sup> See <https://op.europa.eu/en/publication-detail/-/publication/42fc7b39-f8b0-11ef-b7db-01aa75ed71a1/language-en>





consortium members and stakeholders, it is important not to claim homogeneity or a single way to achieve inclusive gender equality. To give an example, VINNOVA as one of the good practices identified throughout WP4 lifetime, has taken an innovative approach to address intersectionality in their innovation proposals through a norm-critical perspective that asks who benefits from the innovation.

A synthesis of some of the recommendations produced during the lifetime of the project with the aim of advancing the field can be found below. They are classified by two main stakeholders as key targets of WP4 policy advice, namely RFOs and the EC, where both can be seen as funding institutions yet at different levels:

## RECOMMENDATIONS FOR RFOs



- Use a variety of examples from diverse scientific disciplines that well illustrate the benefits of integrating an inclusive gender analysis in R&I
- Train **staff** on the topic to equip them with the necessary skills to articulate the rationale and benefits of an inclusive gender analysis in R&I
- Provide methodological **guidance to researchers** to ensure that the integration of an inclusive gender analysis is subject to the same standards of rigour as other areas of research
- Try to make instructions as clear as possible for both applicants and **evaluators**, making use of visual forms of communication
- Focus on increasing the understanding of the issue among proposal evaluators and their correct understanding of what and how

## RECOMMENDATIONS FOR THE EC



- Make an inclusive gender analysis in the content of R&I visible at EU level
- Coordinate policies and align agendas in the ERA through a whole sector approach to advance an inclusive gender analysis
- Strengthen the evaluation procedure for the upcoming FP10
- Give the NCP system a boost by supporting the nomination of gender NCPs and a dedicated network in the ERA
- Propose ways to harmonise policies aimed at integrating sex/gender analysis in R&I with policies aimed at minimising the number of animals used in research, such as innovative approaches and alternative methods in research design
- Give visibility to the gender analysis in R&I policies and analyse the existing gaps and challenges



to evaluate, and/or ensure that a gender expert assists evaluation panels

- Establish a framework for monitoring and evaluating the integration of an inclusive gender analysis, focusing not only on the proposal stage but also on the stages of its implementation and the assessment of its outcomes
- Emphasise the benefits of conducting an inclusive gender analysis, where “inclusive” refers to other factors of inequality that may intersect with sex/gender in the issue under study, as well as to the need to involve different target groups and end users
- Strengthen the evaluation procedure for the upcoming FP10 through continuous monitoring and feedback and gender expertise among reviewers and evaluation panels
- Strengthen policy coordination and alignment of agendas in the ERA from a whole sector approach
- Support financial instruments in FP10 to produce new knowledge and methods, such as co-funding programmes in cooperation with RFOs to produce research on gender studies and intersectionality, inclusive gender indicators at the EIC, and prizes for the best research publications integrating an inclusive gender analysis in R&I

## 6. ACKNOWLEDGEMENTS

WP4 project partners are very grateful for the generous contributions provided by research funding organisations within and beyond the ERA participating in the stakeholder workshop organised in October 2024, as well as to those participating in interviews for the WP4 Position Paper on resistances.

FECYT is particularly grateful to Sophia Ivarsson (VINNOVA) for her support and insights into the development of ERA Action 5 Framework for the Integration and Evaluation of an Inclusive Gender Analysis in R&I Content. Moreover, both Sophia Ivarsson and Helene Schiffbänker (Joanneum Research) facilitated a smooth and close cooperation with the RFO CoP in relation to WP4 topics.

