



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 4.1

Benchmarking and assessment report on guidelines for sex/gender analysis

Due date of the deliverable	31.05.2023
Submission date	31.05.2023
File name	D4.1 – Benchmarking and assessment report on guidelines for sex/gender analysis
Partner responsible for the deliverable	FECYT
Author(s)	Trine Rogg Korsvik (Kilden); Lydia González (FECYT); Jana Dvorackova (TACR)
Contributors	Jessica Illera (FECYT); Laura Bonora (FECYT)
Status	Final version
Dissemination level	PU



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

Views and opinions expressed here are those of the author(s) only and do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them.

DOCUMENT REVISION HISTORY

Revision History			
Version	Date	Modified by	Comments
0.1	05.05.2023	Kilden, FECYT, TACR	First draft
0.2	17.05.2023	Marcela Linkova, Emer Cahill	Comments on the first draft by the Quality Editor and coordinator
0.3	22.05.2023	FECYT, TACR, Kilden	Implementation of the comments, including additional information
1.0	23.05.2023	FECYT, TACR, Kilden	Version 2 shared with the Consortium
1.1	29.05.2023	FECYT, ISAS	Implementation of the comments, including additional information
2.0	31.05.2023	ISAS	Document submission



TABLE OF CONTENTS

1. EXECUTIVE SUMMARY	8
2. INTRODUCTION	11
2.1. About the project.....	11
2.2. Objectives of the report.....	12
2.3. The relationship of this report to other tasks and work packages	12
2.4. Structure of the report	13
3. METHODOLOGY	13
3.1. Target groups.....	13
3.2. Clarification of concepts.....	13
3.3. The survey	14
3.4. Data collection	15
3.5. Mapping instruments.....	16
3.6. Data clearing	16
3.7. The sample	16
3.8. Data analysis	19
3.9. Limitations	20
4. RESULTS	21
4.1. NATIONAL AUTHORITIES.....	21
4.1.1. Actions to promote the integration of the gender dimension in the content of R&I.....	21
4.1.2. Policies to promote sex/gender analysis in teaching and R&I content	24
4.1.2.a) Intersectionality and innovation.....	26
4.1.2.b) Implementation, monitoring and evaluation of policies	26
4.1.2.c) Policies under planning	27
4.1.3. Obstacles and needs	27
4.2. RESEARCH FUNDING ORGANISATIONS	29
4.2.1. RFOs initiatives on gender dimension in R&I	31
4.2.2. Addressing the gender dimension in R&I through specific policies	36
4.2.2.a) Intersectionality and innovation: Two emerging challenges	45
4.2.2.b) Implementation, monitoring and evaluation of policies	48
4.2.3. Obstacles and needs	53
4.3. EVOLUTION OVER TIME	55



5. PROMISING PRACTICES	58
5.1. Identified promising practices among national authorities	59
5.2. Identified promising practices among RFOs	61
5.2.a) Comprehensive addressing of sex/gender analysis throughout the funding cycle	61
5.2.b) Monitoring and evaluation of the implementation of policies for the integration of sex/gender analysis in R&I	66
6. CONCLUSIONS AND RECOMMENDATIONS	69
6.1. National authorities	69
6.2. Research Funding Organisations	71
7. ACKNOWLEDGEMENTS	73
8. REFERENCES	74
ANALYSED DOCUMENTS	75
9. ANNEX I COUNTRY SHEETS	78
10. ANNEX II GENDERACTIONplus survey on the gender dimension in R&I content	124



LIST OF TABLES

Table 1. National authorities participating in the survey	17
Table 2. Funding agencies participating in the survey	18
Table 3. Sample included in 2022, 2020 and 2015 surveys on gender dimension in R&I policies	56

LIST OF FIGURES

Figure 1. Actions taken by national authorities at the national level to promote the integration of the gender dimension in R&I. Number of countries ticking off for each action	22
Figure 2. National authorities with specific policy or strategy to promote sex/gender analysis into R&I content	25
Figure 3. Measures needed by national authorities to promote the gender dimension in R&I content	29
Figure 4. Countries represented by RFOs	30
Figure 5. Widening representation among RFOs	30
Figure 6. Number of initiatives to promote sex/gender analysis among RFOs	32
Figure 7. Initiatives on gender dimension in R&I among RFOs	36
Figure 8. Gender equality policies vs. gender dimension in R&I policies at RFOs	38
Figure 9. Innovation and private sectors considered	45
Figure 10. Intersectional approach to gender dimension in R&I	46
Figure 11. Grounds of intersecting discrimination considered by RFOs	47
Figure 12. RFO needs to advance the gender dimension in R&I	55
Figure 13. Initiatives on gender dimension in R&I	58



LIST OF ACRONYMS

Abbreviation	Meaning
AC	Associated Countries
AEI	Agencia Estatal de Investigación
ARES	Academy of Research and Higher Education
CA	Consortium Agreement
CoGES	Commission on Gender in Higher Education
CoP	Community of Practice
EC	European Commission
EU	European Union
EGET	European Gender Equality Taskforce
ERA	European Research Area
ERAC	European Research Area and Innovation Committee
ERA-NAP	European Research Area National Action Plan
FECYT	Spanish Foundation for Science and Technology
FRRB	Regional Foundation for Biomedical Research
FWO	Research Foundation - Flanders
GA	Grant Agreement
GE	Gender Equality
GEP	Gender Equality Plan
HE	Horizon Europe
IA	Innovation Action
IRC	Irish Research Council
LGBTIQA+	Lesbian, gay, bisexual, transgender, intersex, queer, asexual, plus
MS	EU Member States
NCBR	National Centre for Research and Development
NCN	National Science Centre



RFO	Research Funding Organisation
RCN	Research Council of Norway
RIA	Research and Innovation Action
RIF	Research and Innovation Foundation
RPO	Research Performing Organisation
R&I	Research & Innovation
SDG	Sustainable Development Goal
TACR	Technology Agency of the Czech Republic
TUBITAK	The Scientific and Technological Research Council of Turkey
VINNOVA	Swedish Agency for Innovation Systems
WP	Work Package



1. EXECUTIVE SUMMARY

This benchmarking analysis presents existing policies and measures for integrating the gender dimension into the content of R&I and teaching in 21 countries across the ERA. It highlights promising practices and recommends measures for policy development.

The sample consists of 18 Member States (Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Greece, Ireland, Italy, Lithuania, Malta, Poland, Portugal, Romania, Spain, Sweden) and three Associated Countries (Israel, Norway, Turkey). More than half of the countries represented in the sample are characterised as Widening countries being eligible to receive particular support to widen their participation in Horizon Europe (Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Greece, Lithuania, Malta, Poland, Portugal, Romania, Turkey).

Building on survey responses from 20 RFOs and 15 national authorities responsible for research and innovation and higher education, the benchmark analysis shows that:

- It is still important to provide information to ERA stakeholders on what distinguishes gender dimension in the content of R&I from general gender equality policies, since the conflation of the two concepts continues to persist, particularly among stakeholders with less experience in gender equality policies.
- Several respondents answered as having specific policies for integrating the gender dimension (including sex/gender analysis) in the content of R&I, and subsequently referred to general gender equality policies.
- Document analysis revealed that 20 percent of the national authorities have specific policies or strategies in place for integrating sex/gender analysis into R&I content (Czech Republic, Spain and Sweden). Some countries (Austria, Lithuania and Portugal) are planning to make policies or strategies as part of their endorsement of ERA policies. The few national authorities that have such policies direct them mainly towards public research funding agencies.
- 60 percent of the RFOs answer as having adopted specific policies for integrating the gender dimension in R&I content. Four of these are widening countries (Cyprus, Czech Republic, Poland, Turkey). 50 percent of the analysed policies include an intersectional approach, although almost no comprehensive policy development has been observed in their policy documents.
- The most common measure to promote the gender dimension in R&I content is requiring applicants to specify whether they are considering sex and/or gender in their research/innovation proposal. 47 percent of national authorities and 70 percent of RFOs have such action in place. This trend was also observed in the GENDER-NET Plus mapping in 2021.
- While initiatives related to awareness and support to researchers and reviewers regarding sex/gender analysis are often in place in many funders, other initiatives that entail a higher level of commitment by the organisations – in terms of gender expertise, economic resources and gender equality structures – are underexplored.
- Communication campaigns to make visible the support and tools for sex/gender analysis is a surprisingly underexplored action – developed only by 5 national authorities and 5 RFOs –



despite the low cost and effort involved. This is striking since guidelines and materials in many cases are already available.

- The responsibility of monitoring and evaluating the implementation of policies on the integration of the gender dimension in R&I content is an unfinished business in the case of RFOs and non-existing among the national authorities. As pointed out by former mappings on existing national initiatives on the gender dimension in R&I (see GENDER-NET Plus, measures to address this objective need to be integrated through the whole funding cycle. Indeed, a proper monitoring and evaluation of the gender dimension in R&I is the best way to show positive impact, as will be seen in this report.
- Obstacles faced by RFOs when promoting specific gender dimension in R&I policies have remained almost unchanged since previous survey from 2015 conducted in the framework of GENDER-NET Plus. There is still some resistance from different R&I actors, such as the hierarchy of the institutions, researchers and evaluators.
- Few countries have policies for integrating the gender dimension in the content of higher education teaching and curricula. None of the national authorities have financial incentives/support to promote the gender dimension in teaching content. However, 20 percent have actions to promote sex/gender analysis in university-level curricula (Austria, Belgium FWB, Czech Republic).

Promising practices

- While there are only a few examples that can be highlighted as promising practices among national authorities – see for instance a Swedish governmental directive to ensure the integration of sex/gender analysis in funded research – there are a variety of examples among RFOs whose gender dimension in R&I policies deserve to be followed up in the upcoming years.
- RFOs from our sample that most comprehensively cover all phases of the funding cycle in terms of sex/gender analysis include Vinnova – Sweden, the AEI – Spain, and TACR - Czech Republic.
- The most promising practices identified concerning the existence of an evaluation of the implementation of policies for the gender dimension in R&I are IRC - Ireland, Forte - Sweden, and Vinnova - Sweden.

Recommendations:

- National authorities and RFOs should be offered systematic trainings about sex/gender analysis in the content of R&I. The trainings should also include knowledge about intersectional perspectives.
- Implementation of systematic communication campaigns to disseminate knowledge and advantages of sex/gender analysis in R&I and teaching content should be prioritised by national authorities and RFOs. Such communication campaigns will not only contribute to the visibility of



the gender dimension in R&I, but it will be an opportunity to clarify concepts, objectives and aims of these policies.

- Clear guidelines and definitions of sex/gender analysis versus gender equality/balance measures targeting both researchers and evaluators need to be adopted by all the RFOs in their gender equality policies. The concepts should follow the EC approach to this field of gender & science. Such guidelines should not substitute for the need to include gender experts in different areas of knowledge in evaluation committees for a proper assessment of the integration of the gender dimension in R&I.
- RFOs should keep a clear and consistent discourse regarding the gender dimension in R&I as part of quality and absence of bias in R&I content in the ERA. A communication effort is needed in the RFOs gender equality policies.
- Develop specific capacity-building activities on how to address resistances to the gender dimension in R&I in the framework of the GENDERACTIONplus Communities of Practice.
- Strengthen cooperation with the EC and mutual learning among RFOs towards a culture of policy evaluation, also with regard to the gender dimension in R&I. Planning for monitoring and evaluation should be explicitly foreseen from the design stage of these policies.



2. INTRODUCTION

2.1. 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 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.



2.2. Objectives of the report

GENDERACTIONplus comprises 8 work packages, all of which have taken part in a jointly designed benchmarking survey on the main aspects of gender equality policies in R&I in the ERA framework. According to the GA of the GENDERACTIONplus project, WP4 will conduct a benchmarking analysis of the best guidelines and policies produced at MS and AC level on the gender dimension in the R&I and teaching content [...] The benchmarking analysis particularly looks for methodologies of how RFOs and national authorities make sure that end user profiles, such as researchers, evaluators, teachers and innovators, acquire knowledge of the gender dimension in R&I. The WP4-related benchmarking builds on existing materials such as Gendered Innovations 2 and surveys on the gender dimension in R&I policies (GENDER-NET Plus 2021; Hunt, Nielsen & Schiebinger 2022; Håkansson & Sand 2021; Puy Rodríguez & Pérez 2016).

This deliverable report consists of an analysis of the results of the benchmark survey conducted during October-November 2022 that addressed both national authorities and RFOs involved in GENDERACTIONplus. Specifically, this WP4 report presents an analysis of the information collected in the “Gender dimension in research and innovation” section included in both surveys. Therefore, this report provides an analysis of the status and windows of opportunities regarding sex/gender analysis in the consortium. Considering the large scope of the consortium, involving representation from a number of widening countries, and the fact that we have achieved representation of almost all European regions, this mapping can be useful to reach relevant conclusions on the progress and gaps in the gender dimension in R&I policies in the ERA.

Thus, the benchmarking analysis will help the consortium, and particularly its CoPs, to design further activities on the gender dimension in R&I with the aim of achieving the WP4 objectives, specifically:

- Leverage the content produced on sex/gender analysis 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

2.3. The relationship of this report to other tasks and work packages

The gender dimension in R&I content has direct links to other topics covered by different work packages of the GENDERACTIONplus project, specifically intersectionality (WP2) and Gender Equality Plans (WP6). First, one of the identified challenges to advancing the gender dimension in R&I in the ERA is the inclusion of an intersectional approach. This is the reason why the survey included a question regarding the intersectional perspective in the policies to promote sex/gender analysis in R&I content and this report incorporates a dedicated subsection on these responses that can complement WP2 benchmark report. Second, since 2021 the gender dimension in R&I became one of the recommended content areas for GEPs as an eligibility criterion for beneficiaries of Horizon Europe. This eligibility criterion has had a huge impact on the policies of R&I institutions across the ERA and thus, this report should be read in combination with WP6 benchmark report for a deeper understanding of the role of sex/gender analysis initiatives in current GEPs.



Moreover, this benchmark report will be the most important baseline for further work on gender dimension in R&I policies under WP4 during the lifetime of the project. This means that the results of this benchmark will be used in capacity-building activities targeting the Communities of Practice of the project as well as external stakeholders, and will inform the discussion about topics to be addressed in future policy briefs on the gender dimension in R&I.

2.4. Structure of the report

The next chapter of this report describes the methodology of the benchmarking; the survey, the sample and the quantitative and qualitative analysis of the data. The findings are presented in chapter 3. First, the results of the findings from the responses by the national authorities are presented, followed by the RFO responses. The two parts are similarly structured.

Chapter 4 highlights promising practices that have been identified in the survey, through document analysis and direct communication with the consortium. Conclusions and recommendations are presented in chapter 6.

Annex 1 “Country sheets” is a compilation of the information simplified in tables for consultation by country. It gives an overview of measures and policies for integrating the gender dimension in R&I content in each country, summarizing main findings from the responses by national authorities and RFOs. The part of the survey dealing with measures and policies for integrating the gender dimension in R&I content is found in Annex 2.

3. METHODOLOGY

3.1. Target groups

The benchmarking survey targeted national authorities (ministries, national agencies and organisations that support them) and research funding organisations (RFOs). The survey was sent to representatives of 23 national authorities or supporting organisations and 29 RFOs. Of these, 15 national authorities (and supporting organisations) and 20 RFOs provided complete answers, giving a response rate of 65 and 69 percent, respectively.

3.2. Clarification of concepts

For the purposes of this report, 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 of women and men (sex) and the – changing – social and cultural features of women and men (gender). As clarified in the glossary distributed with the survey, in this report the “gender dimension in R&I” and “sex/gender analysis in R&I” will be used as synonyms.



In this sense, respondents were asked to keep in mind that both terms refer to the content of the research and innovation activities, and not to gender balance in the teams and other measures to promote gender equality within R&I projects (e.g., work-life balance measures). In the case of this WP4 survey, questions on **intersectionality** refer to overlapping or intersecting categories such as gender, sex, ethnicity, age, socioeconomic status, sexual orientation and geographical location that combine to inform individuals' identities and experiences. The term was coined by legal scholar Kimberlé Crenshaw in 1989 to describe how multiple forms of discrimination, power and privilege intersect in Black women's lives, in ways that are erased when sexism and racism are treated separately (Crenshaw, 1989). Since then, the term has been expanded to describe intersecting forms of oppression and inequality emerging from structural advantages and disadvantages that shape a person's or a group's experience and social opportunities (Gendered Innovations 2, 2020).

Moreover, when analysing intersectionality in the context of the gender dimension in R&I it is important to keep in mind the dual level of integration of this topic: intersectionality as an analytical tool that can contribute to highlighting intersecting inequalities in research projects; and intersectionality as a necessary perspective in the design & evaluation of gender dimension in R&I policies both at national authority and RFO level. While the target of the former is researchers and their research projects, the latter relies on decision-makers of the organisations. Moreover, the intersectional approach in the content of R&I should not be confused with gender equality policies in R&I that integrate an intersectional perspective with the aim of increasing diversity in human resources policies or addressing barriers more frequently experienced by certain groups of women (e.g., the most vulnerable groups of women in academia facing sexual harassment).

3.3. The survey

The section "Gender dimension in research and innovation" of the GENDERACTIONplus survey corresponds to WP4's need for information on the status of policies to strengthen the gender dimension in R&I across the ERA. This is not the first mapping on gender dimension in R&I policies. A GENDER-NET Plus report on existing national and regional initiatives on the integration of the gender dimension into research content¹ was published in 2021 after collecting data from consortium members and additional funding agencies. The GENDERACTIONplus WP4 team decided to build – partly - on this former mapping with a double objective: to make use of previous data and practices provided by sister projects funded under H2020 and HE for a better use of knowledge and public resources, keeping also in mind that the European Commission itself recommends the development of synergies among their funded projects on gender equality; and to leverage the content of both mapping reports by providing a comparison and evolution over time for those institutions/countries involved in both surveys.

For this purpose, the GENDERACTIONplus survey includes the following questions in common with former GENDER-NETplus survey:

- *"What kind of actions have been taken by [type of organisation] to promote the integration of the gender dimension into R&I?"*

This multiple-choice question presents a list of actions and measures identified since the ERANET GENDERNET and used in the GENDERNETplus survey from 2020. In addition, several new items were incorporated to the list by the WP4 team.

¹ GENDERNETplus Deliverable 6.2 available at: <https://gender-net-plus.eu/reports/>



- Questions on the implementation, monitoring and evaluation of gender dimension policies/strategies
- Questions in both surveys on obstacles and needs to enforce the gender dimension in R&I content

The WP4 survey comprises 12 common questions for both target groups: national authorities and RFOs. The length of the survey was part of the discussions among analysts since the very beginning of the design due to the well-known “survey fatigue” among the community of H2020/HE funded projects across the ERA. One of the major difficulties encountered by the GENDER-NET Plus team when developing their mapping was the low response rate in the middle of the lockdown. Although the number of countries involved in the GENDERACTIONplus consortium is considerably higher and there was a strong commitment to participate in the benchmark since the beginning of the project, the WP4 team decided to keep the list of questions as short as possible at the risk of leaving out relevant topics. To compensate for this, the survey includes several spaces where respondents can upload official documents to be analysed in depth for more information, without spending more time in filling out the questionnaire.

The WP4 survey starts by asking institutions for their measures/actions to ensure the integration of the gender dimension in R&I and immediately leads respondents to a main split between those institutions with specific policies in place for the gender dimension in R&I and those with no concrete policy. While those institutions with policies on the gender dimension in R&I need to provide information on the type of policy, implementation and impacts, those institutions without specific policies can go directly to questions regarding needs to advance on the gender dimension in R&I in their particular contexts.

Two additional questions have been included in the survey targeting national authorities since they only apply to these types of organisations:

- *“If relevant, do regional RFOs in your country require the integration of the gender dimension in R&I projects?”*
- *“Does your national authority have a policy or strategy aimed at promoting sex/gender analysis in university-level curricula?”*

According to Task 4.1., the benchmarking analysis will particularly look for methodologies of how RFOs and national authorities make sure that end-user profiles, such as researchers, evaluators, teachers, and innovators, acquire knowledge of the gender dimension in R&I. Keeping this objective in mind, the survey includes questions concerning the university-level curricula, innovation and the private sector, as well as measures to evaluate the gender dimension in R&I.

3.4. Data collection

The benchmarking survey was disseminated on 10.10.2022 with the deadline on 6.11.2022. In the case of some respondents, there was an agreement to postpone the deadline (often because of the need to coordinate the collection of information for the questionnaire across the organisation and/or because of



the heavy workload in the autumn and as the end of the year approaches). The last inputs have been received on 18.11.2022.

3.5. Mapping instruments

The data were gathered through the LimeSurvey platform. To facilitate the work of coordinating inputs, a Word version of the questionnaires was sent to respondents along with a link to the questionnaire in the outreach email. Most of the inputs were entered via online questionnaire, in two cases the answers were sent in a word document.

3.6. Data clearing

All data with survey answers was downloaded from LimeSurvey as an excel file. Attached documents were mostly in PDF format (only exceptionally in Word format). There were overall 50 attached documents in the survey from the national authority benchmarking survey and 14 among responses from RFOs.

In the excel file of answers, partial adjustments were made to a few respondents' answers, e.g., change or adding of country name to country code (Poland => PL, Spain=>ES), in one case the name of organisation was omitted by the respondent and was therefore added in the data cleaning phase. The two respondents to the survey who submitted in Word format were manually added to the excel files.

In the next step, the answers, that were complete, were filtered and the duplicate inputs were omitted. As a result, there were overall 20 answers from RFOs and 15 from national authorities (or supporting organisations).

3.7. The sample

The sample of national authorities participating in the survey includes 15 responses from 14 countries. 12 of them are EU Member States and 2 are Associated countries to Horizon Europe (Israel and Norway). Of the 15 responses, eight of them are provided by ministries responsible for research and higher education. The supporting organisations consist of three universities and four other institutions such as research institutes that have answered on behalf of their national authorities. Supporting organisations are marked with an asterisk in the table below. In the report both ministries and supporting organisations are referred to as “national authorities”.



Table 1. National authorities participating in the survey

National authorities participating in the survey		
Country	Name	Corresponding RFO
Austria	Ministry of Education, Science and Research	
Belgium-Flanders	Department Economy, Science and Innovation	Research Foundation - Flanders (FWO)
Belgium-FWB	Ministry of the Wallonia-Brussels Federation	Fund for Scientific Research (FNRS)
Croatia	Ministry of Science and Education	
Czech Republic	Institute of Sociology of the Academy of Sciences of the Czech Republic *	Technology Agency of the Czech Republic (TACR)
Denmark	University of Southern Denmark (SDU)*	Independent Research Fund Denmark (DFF)
Greece	National Documentation Centre *	
Ireland	Higher Education Authority	Irish Research Council
Israel	Ministry of Innovation, Science & Technology	
Lithuania	Vilnius University Šiauliai Academy *	Research Council Lithuania
Norway	Ministry of Education and Research	Research Council of Norway (RCN)
Poland	National Information Processing Institute *	National Centre for Research and Development (NCBR)
		National Science Centre
Portugal	Ministry for Science and Technology and Higher Education	Foundation for Science and Technology (FCT)
Spain	Ministry of Science and Innovation	State Research Agency (AEI)
Sweden	University of Gothenburg *	Vinnova Swedish Agency for Innovation Systems
		Forte, Swedish Research Council for Health, Working Life and Welfare



The sample of funding agencies participating in the survey includes 20 responses corresponding to 17 countries. Similar to the national authorities sample, responses from RFOs belonging to Associated countries to Horizon Europe have been collected, in this case Norway and Turkey.

Table 2. Funding agencies participating in the survey

Funding agencies participating in the survey		
Country	Name	Corresponding national authority
Belgium-Flanders	Research Foundation - Flanders (FWO)	Department Economy, Science and Innovation
Belgium-FWB	Fund for Scientific Research (FNRS)	Ministry of the Wallonia-Brussels Federation
Bulgaria	Bulgarian National Science Fund	
Cyprus	Research and Innovation Foundation	
Czech Republic	Technology Agency of the Czech Republic (TACR)	Institute of Sociology of the Academy of Sciences of the Czech Republic
Denmark	Independent Research Fund Denmark (DFF)	University of Southern Denmark (SDU)
Estonia	Estonian Research Council	
Ireland	Irish Research Council	Higher Education Authority
Italy	Regional Foundation for Biomedical Research	
Lithuania	Research Council Lithuania	Vilnius University Šiauliai Academy
Malta	Malta Council for Science and Technology (MCST)	
Norway	Research Council of Norway (RCN)	Ministry of Education and Research
Poland	National Centre for Research and Development (NCBR)	National Information Processing Institute
	National Science Centre	
Portugal	Foundation for Science and Technology (FCT)	Ministry for Science and Technology and Higher Education



Romania	Executive Agency for Higher Education, Research, Development and Innovation Funding (UEFISCDI)	
Spain	State Research Agency (AEI)	Ministry of Science and Innovation
Sweden	Vinnova Swedish Agency for Innovation Systems	University of Gothenburg
	Forte, Swedish Research Council for Health, Working Life and Welfare	
Turkey	The Scientific and Technological Research Council of Turkey	

Thus, the number of cases in which both the national authority and their correspondent RFO(s) are available reaches ten: Belgium (both Flanders and Wallonia-Brussels Federation), Czech Republic, Denmark, Ireland, Lithuania, Norway, Poland, Portugal, Spain and Sweden. In these cases, a more complete picture of coordinated action on gender can be obtained.

3.8. Data analysis

Once the data was cleaned, the team started analysing the quantitative data, focussing on the part of the survey dedicated to questions about measures and policies concerning the gender dimension in R&I (and teaching, for the national authorities). Subsequently, the qualitative answers were compiled and analysed. The respondents were also asked to provide links to supporting documents. In several cases the links did not work, so it was necessary to identify them either through internet or through personal correspondence with the contact person. The documents were accordingly subject to qualitative analysis. Although the GENDERACTIONplus survey linked to a Glossary in which the concept of the gender dimension in R&I content and sex/gender analyses were defined, the qualitative analysis revealed that several respondents had misinterpreted the concepts and, instead, referred to general gender equality policies. Thus, the contact persons were contacted to clarify the policies and measures in question.

In the case of responses coming from research funding organisations, the quantitative analysis that led to descriptive statistics in this report refers to the whole sample in the survey, as well as the figures on needs to advance the gender dimension in R&I. In a second stage, the analysis focused on a reduced sample of research funders that have specific policies in place on sex/gender analysis in R&I content (12 RFOs). This reduced sample provided policy documents and qualitative information on the implementation, monitoring, evaluation and obstacles of their policies that were analysed by Task 4.1 team.

Even though the respondents represent national authorities and RFOs giving information about official policies, it was chosen to anonymise the open answers and not to name institutions that to a less extent have developed policies on integrating the gender dimension in R&I content. An important aim of this study is to highlight promising practices in this regard.



Finally, in order to support the data analysis of the team but also to provide a tool for data visualisation of the responses, a dashboard has been designed² and is available on the project website: <https://genderaction.eu/wp4-benchmarking-data-visualisation/>

3.9. Limitations

Task 4.1. team made efforts to have a sample as large as possible and to have quantitative and qualitative data as much detailed and accurate as possible. Concretely, the analysts kept in mind that a reduced number of questions may lead to a higher response rate when designing the survey, and gave opportunities to the respondents to provide additional documents and refined responses once the survey was completed. In spite of these efforts, this benchmark analysis presents three main limitations:

1) Sample: The sample of this benchmark represents almost entirely the composition of the consortium, including its communities of practices of national authorities and RFOs. Responses from relevant EU countries such as France and Germany, for instance, could not be collected. Involving respondents outside a given consortium is always a challenge for this kind of exercises to map national policies. In that sense, the state of the art, conclusions and promising practices selected cannot be extrapolated to the whole ERA. Particularly, section 3.3. on Evolution over time regarding RFO policies for the gender dimension in R&I, addresses the limitations of this attempt to compare the status of these policies three years after the data collection under GENDER-NET Plus mapping, since only 9 RFOs could be compared.

2) Language: several policy documents are not officially translated into English for dissemination purposes, and a translation into English was not provided by the correspondent respondents. This has led to difficulties to analyse some of the documents/webpages in languages other than English and French.

3) Lack of information: Complete questionnaires were not received in all cases. As expected, open questions that could provide rich information for the analysis were not completed in a thorough way. Moreover, in some cases, policy documents were not provided and thus the information regarding those responses was incomplete and more general. Related to this issue is the different detail of information provided by some of the respondents compared to others. The analysts may have interpreted a more detailed level of information as a higher level of involvement in gender equality policies by those respondents. This may introduce a certain bias in the analysis, given that those institutions with a poor level of information may not receive as much attention as the others. Indeed, there is a recommendation at the end of this report that calls on research funding organisations to make more effort to document in a more detailed way in their policy documents all the activities they conduct to promote the gender dimension in R&I.

² The WP4 dashboard has been designed by Laura Bonora from FECYT, who is acknowledged as contributor to the data analysis of the report.



4. RESULTS

4.1. NATIONAL AUTHORITIES

In this section, we present an overview of the findings from the answers from 15 national authorities about national policies on the integration of the gender dimension and sex/gender analysis in the content of research and innovation. 12 Member States are represented¹ and two Associated Countries (Norway and Israel). 50 percent of the countries are characterised as Widening countries being eligible to receive particular support to widen their participation in Horizon Europe (Croatia, Czech Republic, Greece, Lithuania, Poland and Portugal).

The national authorities of the sample consist of eight ministries responsible for research and higher education, three universities and four other institutions, such as research institutes.

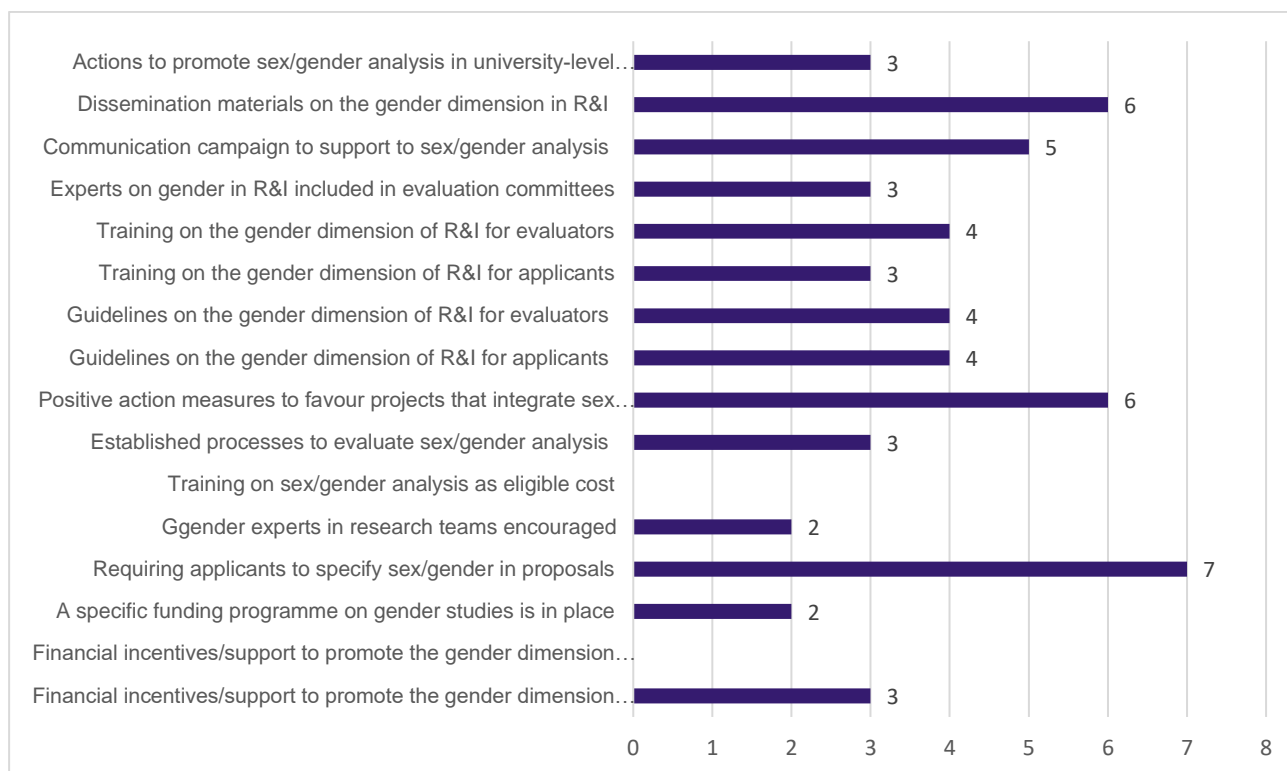
4.1.1. Actions to promote the integration of the gender dimension in the content of R&I

The part of the GENDERACTIONplus survey dealing with the gender dimension in research and innovation content starts with a multiple-choice question. Here, the respondents were asked to select the actions that their national authority has taken to promote the integration of the gender dimension in research and innovation. Fourteen of the types of actions are similar to the questions posed to the RFOs, that in turn, were inspired by the previous GENDER-NET Plus survey from 2020 (GENDER-NET Plus, 2021). In addition, national authorities could choose two actions concerning higher education, namely *Financial incentives/support to promote the gender dimension in teaching content* and *Actions to promote sex/gender analysis in university-level curricula*.

Frequently, national authorities allocate the responsibility for actions to promote the integration of the gender dimension in R&I to RFOs. Thus, they generally have fewer actions than the RFOs of their country. Figure 1 shows the distribution of different actions to promote the integration of the gender dimension in R&I among the 15 national authorities.



Figure 1. Actions taken by national authorities at the national level to promote the integration of the gender dimension in R&I. Number of countries ticking off for each action



Source: data collected through 2022 GENDERACTIONplus survey

The most common action is **requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal**, with 47 percent (7 respondents). As shown below, this action is also the most common among the RFOs (with 70 percent), as it was in the previous GENDER-NET Plus mapping from 2020 (also 70 percent). Likewise, **dissemination materials on the gender dimension in R&I available** is listed as the second most common action among national authorities, with 40 percent (6 respondents). **Communication campaign to make visible the support to sex/gender analysis** is ticked off by 33 percent (5 respondents).

Interestingly, 40 percent of the national authorities answer that they have **positive action measures to favour projects that integrate sex and/or gender** (6 respondents), whereas only 20 percent of the RFO answer the same (see next chapter). In GENDER-NET Plus, only one single RFO answered to have such a measure in place. The positive action measure of favouring projects that integrate sex and/or gender perspectives over those who don't, is often seen as controversial. Based on a more detailed analysis of the submitted answers, it may be hypothesised that some respondents of the national authorities have a different understanding of these measures in comparison to the RFOs that may consider this from the perspective of a concrete implementation more readily than the national authorities. To further illustrate this point, we observe that national authorities have few other actions in place. For example, only 20 percent (3 respondents) of them have **financial incentives or support to promote the gender dimension in research and innovation** or have **established processes to**



evaluate the integration of the sex/gender analysis into R&I (i.e., as part of the institution's mandate and through well-established guidelines on the evaluation). Only 13 percent (2 respondents) of the national authorities **encourage the inclusion of gender experts in R&I calls** or have a **specific funding programme for gender studies**. None of the national authorities has **training on sex/gender analysis for the research and innovation team as an eligible cost in the RFO funding schemes**. In conclusion, it is likely that the 40 percent claiming to have positive action measures to favour projects that integrate sex and/or gender have misinterpreted the subject matter of this kind of action.

Regarding the questions about higher education, we note that none of the national authorities answers to have **financial incentives/support to promote the gender dimension in teaching content**. 20 percent answer that they have **actions to promote sex/gender analysis in university-level curricula** (see also section 3.1.2 below).

Other actions taken at the national level

Five of the national authorities state not to have taken any of the listed actions at the national level to promote the integration of the gender dimension in R&I. However, Belgium FWB, the Czech Republic and Norway have other arrangements. The Norwegian Ministry of Education and Research explains that actions to promote the integration of the gender dimension in R&I at the national level are delegated to the Research Council of Norway, which is the only national RFO in Norway.

Comparably, in the Czech Republic, the Ministry of Education, Youth and Sports supports and partially funds the Centre for Gender & Science (ISAS), which runs activities such as the web section One Size Does Not Fit All that aims to support the integration of the gender dimension in research and innovation by introducing the issue and providing examples from various disciplines.² ISAS also organises trainings on the gender dimension through open access e-learning modules, workshops and lectures in RPOs. In October 2022, the Working Group for Gender Equality (under the Council for Research, Development and Innovation, an Office of the Government), whose activities are expertly supported by ISAS, organised a workshop for representatives of RFOs about the integration of the gender dimension in funding programs.

In Belgium, the Ministry of the Wallonia-Brussels Federation has adopted an action plan for women's rights in which one of the actions is to award prizes for research in gender studies or scientific work carried out by women. Another action is to include "gender" as a criterion for concerted research actions (ARC).³ Every year, the Women and Science Committee of the Academy of Research and Higher Education (ARES) awards prizes for research integrating a gender dimension.⁴ The Women and Science Committee also recommends RFOs and universities to "systematically question the variables gender (socio-cultural construction) and sex (biological) in the content of the research in the calls for projects with the integration, where appropriate, of an intersectional perspective".⁵ The Academy of Research and Higher Education (ARES) has a commission on gender in higher education (*Commission Genre en Enseignement Supérieur*). One of its missions is to promote the integration of the gender dimension in all curricula, training, content and research in higher education.⁶ The research funding scheme for university colleges in Wallonia-Brussels, *Financement de la Recherche en Hautes Écoles*, mentions the gender dimension in the content of R&I as one of the quality criteria of scientific projects.⁷



4.1.2. Policies to promote sex/gender analysis in teaching and R&I content

The question about whether there are policies in place at the national level to promote sex/gender analysis in university-level curricula was only posed to national authorities and not to RFOs. All the national authorities answered the question. The content analysis showed that three national authorities have a policy or strategy aimed at promoting sex/gender analysis in university-level curricula.

In the **Austrian** university sector, there are several documents which include the promotion of sex/gender analysis in R&I content. In the Austrian National Development Plan for Public Universities (GUEP), Objective 8 on Social responsibility of universities includes a section on gender equality. Here, the integration of the gender dimension into research-led teaching is stressed as a means to increase the quality of education.⁸

In the **Czech Republic**, a specific Gender Equality Strategy includes a task about supporting the introduction of a gender dimension into teaching at faculties training teachers and other faculties in the Czech Republic.⁹

Belgium Wallonia-Brussels Federation seems to have the most comprehensive policy on the promotion of sex/gender analysis in university-level curricula through its Women's Rights Plan (action 1.9). The gender dimension is integrated in curricula in health professions and human sciences professions (psychology, human resources, communication, law, etc.). Interestingly, the integration of the gender dimension in these curricula was the result of a participatory study on the violence against women in higher education conducted by the Equal Opportunities Directorate of the Ministry of the FWB, with the logistical support of the Academy for Research and Higher Education (ARES), in 2019. Based on the results of the participatory reflection, the ARES will be responsible for raising the awareness of the academic actors concerned with a view to adaptation of the programmes towards this objective. According to the Ministry of the Wallonia-Brussels Federation, this work could lead to the definition of minimum contents in this regard, in accordance with Article 125 of the Decree of 7 November 2013, or even to the creation of one or more inter-university certificates.¹⁰

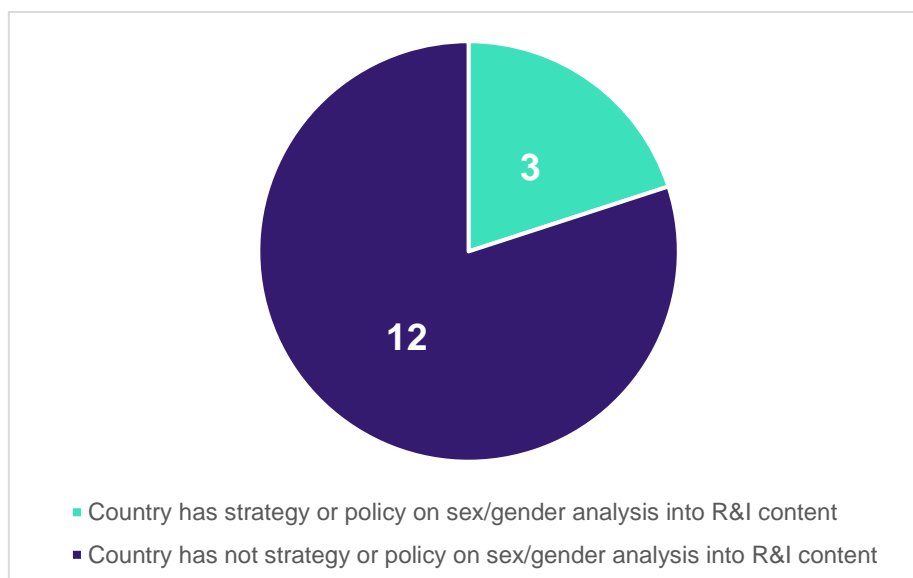
In addition, the gender dimension is explicitly specified in the revision of initial teacher training. Particularly in training to and through practice, didactic and pedagogical training and training in human and social sciences.¹¹ The Commission on Gender in Higher Education (CoGES) and the Women in Science Committee (*Comité Femmes et Sciences*) have drafted a note for the Unit in charge of accompanying the implementation of the reform of initial teacher training, including a proposal for the HEIs of minimum contents to be integrated in the initial teacher training programmes.¹²

Only 20 percent of the national authorities have specific policies or strategies at the national level aimed at integrating sex/gender analysis into R&I content.

By policy at the national level, we refer to plans of actions that have been agreed to officially by the government. By strategy, we mean plans of action designed to achieve a long-term or overall aim. Six respondents answered that they had such a policy or strategy. However, the content analysis and communication with the respondents, revealed that three of them conflated the gender dimension in research content with general gender equality policies, and thus referred to documents about encouraging gender equality in R&I. Thus, only three, or 20 percent, out of 15 national authorities have a specific strategy or policy aimed at integrating sex/gender analysis into R&I content (see Figure 2).



Figure 2. National authorities with specific policy or strategy to promote sex/gender analysis into R&I content. Absolute numbers.



Source: data collected through 2022 GENDERACTIONplus survey

Those who replied that they have such a strategy or policy in place were asked to provide the type and name of their national or regional official policy, add links to supporting documents, and specify the relevant passages. Additionally, they were asked to outline the main goals of the policy, whether it includes an intersectional approach, as well as whether it includes the innovation and private sectors in the objective of producing non-biased knowledge and solutions for society. A supplementary question was whether regional RFOs are requiring the integration of the gender dimension in R&I projects.

The three national authorities have different types of policies. None of them has a national law about the integration of sex/gender analysis into R&I content. Sweden replied to have a specific strategy, policy and/or measure (e.g., gender equality plan), while the Czech Republic and Spain have "other" kind of strategy/policy. In Spain and Sweden, also regional RFOs require the integration of the gender dimension in R&I projects.

In **Sweden**, there is a Government instruction to governmental RFOs claiming their responsibility to integrate gender dimensions in research content in their funding schemes. Point 13 of the instructions from the Ministry to the Swedish Research Council is to work to ensure that a gender perspective is included in the research they fund, when applicable. This instruction is part of the Swedish Research Council's obligation to provide support for basic research of the highest scientific quality in all scientific fields.¹³ The main goal of the instruction is "to enhance the quality of research and innovation". The Swedish Government Instruction to the RFOs was highlighted as a promising practice in former GENDER-NET Plus mapping.

In the **Czech Republic**, the measures in place addressing the gender dimension in R&I at the national level are part of a broader Gender Equality Strategy (2021–2030). Here, one of the strategic objectives is expanding the content of education, science and research to include a gender perspective.¹⁴ Two of the tasks of the Gender Equality Strategy are about the integration of the gender dimension. One is



about taking into account the dimension of sex and gender in the content of research, development and innovation as part of the support for RDI projects. The other is about "implementing the dimension of sex and gender in the content of research and innovations as a criterion of evaluation of research and university institutions for the purposes of institutional funding".

In **Spain**, the state research agency AEI is in charge of developing a specific policy for the gender dimension in R&I. However, in 2022 the Law of Science, Technology and Innovation was modified. One of the amendments was that the public agents of the Spanish Science, Technology and Innovation System would promote the implementation of measures to achieve the integration of the gender dimension in the content of R&I. Such measures may be training, advice and capacity-building mechanisms to guide research personnel, scientific management personnel and evaluation personnel in the integration of the gender dimension in the content of R&D&I.¹⁵ The goal of the Spanish Ministry for Science and Innovation is to "increase the knowledge on the gender dimension in R&I of all the agents involved in the research funding cycle (researchers, scientific management staff and evaluators), including unconscious bias and gender biases, with the aim of having a positive impact on the integration of a gender perspective in R&I projects."

4.1.2.a) Intersectionality and innovation

The national authorities stating to have a strategy or policy aimed at integrating sex/gender analysis into R&I content were asked if it includes an intersectional approach. And, if yes, to tick off for different inequality grounds included in their intersectional approach.

According to the content analysis, none of the national strategies or policies aimed at integrating sex/gender analysis into R&I content includes an intersectional approach.

Additionally, the national authorities were asked if the strategy or policy includes the innovation and private sectors in the objective of producing non-biased knowledge and solutions for society. Spain and Sweden answer positively to this question.

4.1.2.b) Implementation, monitoring and evaluation of policies

In the survey, the national authorities which have a strategy or policy on the gender dimension in R&I were asked open questions about the implementation, monitoring and evaluation of their strategies or policies. Regarding the *implementation* of the strategy or policy, the respondents were asked to provide information on the unit(s) responsible for implementing the policy, the actions taken so far, and the structures developed for its implementation, including technical, human and economic resources.

To describe the *monitoring* of the policies, the respondents were asked to provide information on the actions and structures to supervise the concrete actions developed by the national authority /other agents of the R&I system, the indicators used and their outcomes. In addition, the respondents were asked whether their policy has been evaluated, and, if so, to describe the impact or outcome of their strategy or policy.

The answers confirm the conclusions of GENDER-NET Plus exposing a fragmented responsibility for the implementation and monitoring of policies. Evaluation of policies is not performed by any of the national authorities. In **Sweden**, these tasks are allocated to the RFOs, that are responsible for organising, implementing, monitoring and evaluating the activities performed on integrating the gender dimension in R&I. Each RFO has its own monitoring system, documenting and analysing data on the



use of gender dimension in research. There is no monitoring in place by the government or an overarching national HE authority, and none of the RFOs has any specific extra funding from the government for this activity. Thus, evaluations of policies have not been performed at the governmental level or by other national HE authorities, but occasionally at the RFO level (see the part on RFO policies below).

In the **Czech Republic**, the providers of RDI funding (public RFOs and different ministries) are responsible for the implementation of policies on the gender dimension in research content, which, as mentioned above, are part of the Czech Gender Equality Strategy for 2021–2030. The monitoring of the implementation of the Gender Equality Strategy is performed by the Department of Gender Equality of the Office of the Czech Government. Once a year, it asks entities accountable for the implementation of particular tasks of the Strategy about how it was implemented, makes a report and provides feedback on reporting and implementation.¹⁶ According to the findings of the monitoring by the Department of Gender Equality, the implementation of the Gender Equality Strategy is overall inferior.¹⁷

As mentioned above, in **Spain**, the Law of Science, Technology and Innovation was modified in 2022, ensuring all public agents of the Spanish R&I system promote the implementation of measures to achieve the integration of the gender dimension in the content of R&I. The legislation is still very new, and has, for the time being, not resulted in a strategy with concrete measures. On the other hand, there are guidelines on the gender dimension in R&I in place that must be followed by all the public agents of the Spanish R&I system. The monitoring of the way these agents comply with the new mandate on the gender dimension in R&I is still under planning by the Women and Science Unit of the Ministry of Science and Innovation.

4.1.2.c) Policies under planning

The national authorities, which do not have a strategy or policy aimed at integrating sex/gender analysis into R&I content, were asked if they plan to make such strategy or policy and to explain the context of the plans. Three of them (Austria, Lithuania and Portugal) confirm that they plan to make a strategy or policy aimed at integrating sex/gender analysis into R&I content. The other countries do not have such a plan.

The context of the planned strategies or policies aimed at integrating sex/gender analysis into R&I content is the policies of the European Research Area. The ERA Policy Agenda's Action 5 (Promote gender equality and foster inclusiveness) recommends its members to develop principles for the integration and evaluation of the gender dimension in R&I content in cooperation with national RFOs. Austria, Lithuania and Portugal have all endorsed the ERA Policy Agenda and are planning to integrate its recommendations.

In the **Austrian** national ERA Action Plan (ERA-NAP 2022-2025), several actions to promote the integration of the gender dimension into research and innovation content and into research-led teaching are under development. The actions include awareness-raising measures and the development of national guidelines for the allocation of research funding relating to GEPs. European FEMtech research projects also support research and innovation that include sex and gender analysis.

4.1.3. Obstacles and needs

When asked about possible challenges or obstacles faced in implementing the policy or strategy on the gender dimension in R&I, the issue that is highlighted the most by the national authorities is the **lack of**



understanding of what the concept of the gender dimension in R&I means. As the content analysis also clearly exposed, the concept is frequently confused with gender equality policies and or gender balance in research teams. The lack of understanding of the concept is frequent among researchers, but also research funders and RFO employees responsible for the development of research funding programmes do not have sufficient awareness and experience of what the gender dimension in R&I content involves, according to the respondents. Another issue that was mentioned was **the lack of economic and human resources** to include gender experts in the review panels of the funding calls to rank the project proposals and award funds.

Resistance against gender equality overall – and gender studies in particular – was also pointed out as a challenge. One of the respondents stressed resistances from anti-gender, populist movements that spread the message of gender studies as a non-rigorous area of knowledge and a waste of money for R&I as a challenge.

Finally, all the national authorities were asked to indicate multiple measures they need to promote sex and gender analyses and integration of the gender dimension in R&I content. Given the results discussed above, it is no surprise that 10 out of 15 respondents (or 67 percent) answered that **more awareness on the relevance on sex/gender analysis for R&I** is needed (see Figure 3). The same number of respondents want to **exchange experiences on how to consider the gender dimension in R&I from an intersectional perspective**. As shown above, no national authorities have policies on the gender dimension in the content of R&I, which include an intersectional approach, at the same time as ERA policies are encouraging such perspectives.

The second much wanted measures are **financial resources** and **capacity-building**, each gaining 53 percent of the responses.

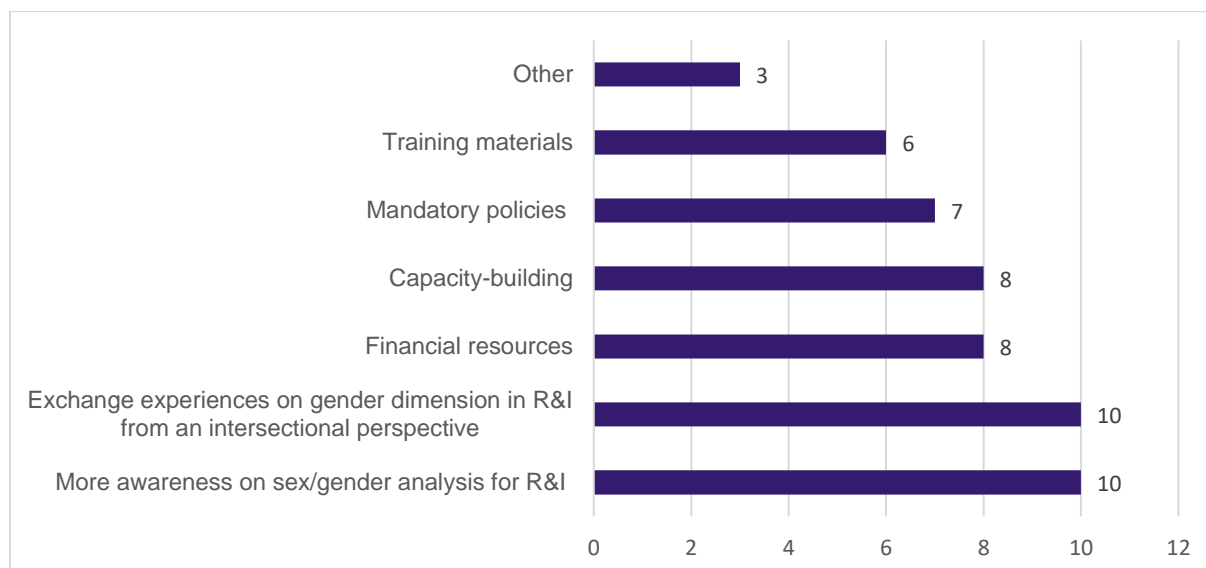
Mandatory policies, like, for example, conditional funding, are wanted by 47 percent (or 7) of the respondents. Only 40 percent of the respondents answer to need **training materials**.

Three of the national authorities selected all six types of actions, whereas two selected none of them. On average, the national authorities selected 3,5 actions each.

In addition to the multiple-choice question, the respondents could propose other measures. One proposition was *guidelines on the gender dimension in R&I content for national authorities*.



Figure 3. Measures needed by national authorities to promote the gender dimension in R&I content



Source: data collected through 2022 GENDERACTIONplus survey

4.2. RESEARCH FUNDING ORGANISATIONS

The sample is composed of 20 RFOs from a variety of countries, from the North of Europe to South and Central and Eastern Europe (see Figure 4). Concretely, the RFOs' responses come from 15 Member States³ and 2 Associated Countries (Norway and Turkey), of which 11 RFOs represent Widening countries⁴ (see Figure 5). This balance between widening and non-widening countries is certainly an asset of this benchmarking exercise since the main aim of WP4 is to enhance *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*⁵. Special efforts are to be made **to bridge the widening gap regarding sex/gender analysis in R&I content**. If we can do more sophisticated analyses, our policy advice will be more refined and, presumably, policies will also have a chance to improve their design, implementation and evaluation. For this to happen, we need enough data from widening countries.

³ Belgium, Bulgaria, Czech Republic, Cyprus, Denmark, Estonia, Ireland, Italy, Lithuania, Malta, Poland, Portugal, Romania, Spain and Sweden. Belgium, Poland and Sweden are represented by 2 RFOs each.

⁴ FCT (Portugal), NCN and NCBR (Poland), BNSF (Bulgaria), TACR (Czech Republic), ETAg (Estonia), MCST (Malta), UEFISCDI (Romania), LMT (Lithuania), TUBITAK (Turkey), RFI (Cyprus).

⁵ See Annex 1 Description of the action of the Grant Agreement no. 101058093.

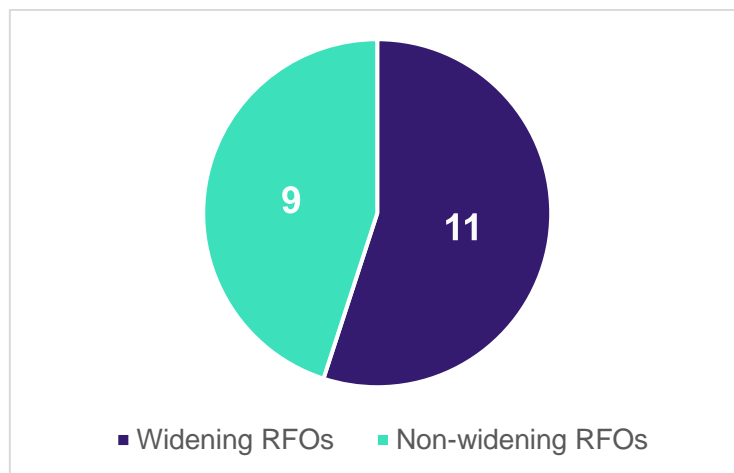


Figure 4. Countries represented by RFOs



Source: data collected through 2022 GENDERACTIONplus survey. Retrieved from: <https://genderaction.eu/wp4-benchmarking-data-visualisation/> where different colour intensity refers to number of initiatives on sex/gender analysis

Figure 5. Widening representation among RFOs



Source: data collected through 2022 GENDERACTIONplus survey



30% of the sample (6 RFOs) supports all types of research, i.e., basic research/blue skies, applied research and innovation. Of the remaining 70% that focus on some types of research only, 79% support basic research/ blue skies and 50% fund applied research (based on multiple choice). Only 3 RFOs focused on some types of research cover innovation, which always occurs in combination with funding applied research (VINNOVA - Sweden, TACR – Czech Republic, NCBR- Poland). The limited number of these examples reduce the capacity to analyse how funding agencies that focus on innovation address the gender dimension in R&I. In addition, one RFO in the sample supports strategic research and another one the higher education sector.

Regarding areas of knowledge, the most common situation is that RFOs cover all fields of research (75%). As for the rest of the sample, MCST - Malta funds all areas except for humanities, NCBR - Poland funds all areas except for social sciences and humanities, BNSF - Bulgaria funds all areas except for interdisciplinary research, FORTE - Sweden specialises in medical and health sciences and also social sciences and humanities, and FRRB - Italy focuses on medical and health sciences.

4.2.1. RFOs initiatives on gender dimension in R&I

Our sample consists of experienced and active funding agencies in gender equality, since 95% have a gender equality policy in place. This means that only one of the funders - among the widening countries - does not have a gender equality policy yet. Moreover, all funding agencies except two have conducted activities to specifically promote the integration of sex/gender analysis in research content.

From a list of 14 well-known initiatives among funding agencies to ensure the integration of the gender dimension in R&I⁶, respondents have been able to select all relevant initiatives in place and add other different initiatives from the list. Those funding agencies that have more than ten of the listed measures in place are Vinnova - Sweden, NCN - Poland, NCBR – Poland, and TACR – Czech Republic⁷. In contrast, those that have adopted the fewest initiatives include RFOs from widening countries in Central and Eastern Europe and also Southern Europe. However, the two RFOs in the sample that have yet not adopted any specific measure are not from widening countries.

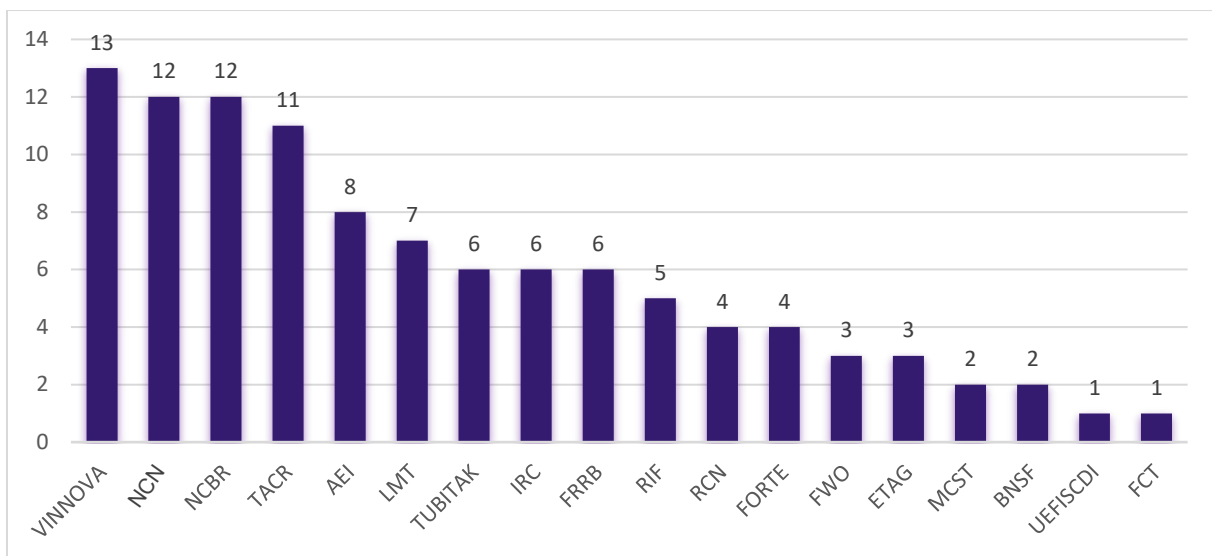
⁶ Financial incentives/support to promote the gender dimension in research and innovation; A specific funding programme on gender studies is in place; Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal; Inclusion of gender experts in the research and innovation teams is encouraged in the R&I calls; Training on sex/gender analysis for the research and innovation team is considered as an eligible cost in the RFO funding schemes ; Established processes to evaluate the integration of the sex/gender analysis into R&I (i.e., as part of the institution's mandate and through well-established guidelines on the evaluation); Positive action measures to favour projects that integrate sex and/or gender (go to the glossary for a definition of positive action measures) ; Guidelines on the gender dimension of R&I for applicants; Guidelines on the gender dimension of R&I for evaluators; Training on the gender dimension of R&I for applicants; Training on the gender dimension of R&I for evaluators; Experts on gender in R&I are included in the evaluation committees; Communication campaign to make visible the support to sex/gender analysis; Dissemination materials on the gender dimension in R&I available (videos, academic papers, leaflets...).

⁷ In the case of TACR, some of the listed measures were limited to selected calls for proposals.



The RFOs that have adopted a wider range of measures can potentially ensure a proper integration of the gender dimension in R&I throughout all the phases of the funding cycle. However, the number of initiatives is not directly related to having a comprehensive, specific, and dynamic policy on the gender dimension in R&I, as will be seen in the following section. This exercise serves only for the purpose of identifying the absence of measures and for assessing which are the most and least frequent ones.

Figure 6. Number of initiatives to promote sex/gender analysis among RFOs



Source: data collected through 2022 GENDERACTIONplus survey

Two cases of institutions with the smallest number of initiatives are remarkable for the same reason: they have adopted the most complex measures. Specifically, MCST - Malta has adopted positive action measures to favour projects that integrate sex and/or gender, that is, in the case of proposals with similar scores, proposal(s) with a gender dimension are given a higher ranking; and FCT has a funding programme on gender studies in place. Both initiatives, positive action measures and funding programme on gender studies, are among the least common measures among funding agencies, as will be seen below.

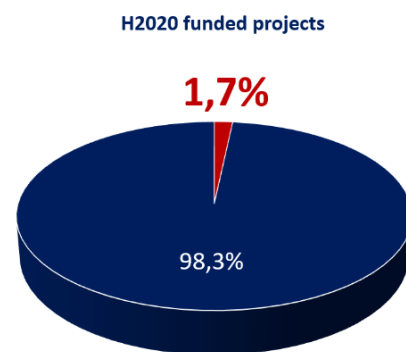
Moreover, several funding agencies have included additional measures to ensure sex/gender analysis in R&I content. Vinnova - Sweden provides support tools and maintains an active participation in international networks to promote the gender dimension in R&I. This external aspect of gender equality policies in funding agencies has been widely analysed in the WP2 benchmark report (see GENDERACTIONplus Deliverable 2.1). Although MCST - Malta has not conducted any of the training measures listed, this funding agency carries out training on the gender dimension in R&I internally targeting the staff rather than applicants. In the case of the AEI, several indicators on the gender dimension in R&I are included in the monitoring procedure of funded projects.



With regard to the type of initiatives among RFOs, it has been considered that the most common ones are those adopted by at least half of the sample. As expected, requiring applicants to specify how they are considering sex/gender in the content of the research proposals is the most common initiative in the sample (14 RFOs) (see Figure 7). This type of measure became quite frequent as part of spill-over effects after being adopted and promoted by the European Commission since the Horizon 2020 rules for participation and then reinforced in Horizon Europe.

The EC approach to the gender dimension in R&I

Although the EC had developed ambitious measures to promote the gender dimension in R&I proposals funded by the EU Framework Programme since Horizon 2020, the results were not as outstanding as expected, since at European level only around 1.7% of all Horizon 2020 projects integrated the gender dimension.



According to the rules for participation in the current Framework Programme, the gender dimension in R&I projects is an award criterion and needs to be integrated in all the topics by default. This is a mandatory requirement unless the concrete topic establishes that sex/gender analysis is not mandatory. By doing this, Horizon Europe intended a shift from the “flagging gender topics” model to the “by default” model.

The sex/gender analysis in Horizon Europe proposals will be evaluated under the “Excellence” criterion for Research and Innovation Actions (RIAs) as well as Innovation Actions (IAs). This means that the gender dimension in R&I is considered as part of the pertinence of the project’s objectives and an indicator of whether the proposed work is ambitious and goes beyond the state of the art. The proposal evaluation will particularly look at 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.”*

Source: European Commission, 2022. [Horizon Europe Programme Guide](#).



Normally, RFOs introduce this kind of question in the application form and a justification is needed when applicants consider that sex/gender analysis is not relevant for the object of the study. In the case of the FWO – Belgium (Flanders), for instance, for each application, applicants must answer the question “Did you take the issues of gender and diversity into account while designing your research plan (e.g. selection of human participants and/or animals in experiments, relevance of research questions and/or results with respect to gender differences, ...)?” and provide a justification on how they will take gender and diversity into account or why it is not applicable for their research proposal. The information provided by the applicants is taken into account during the evaluation of the application.

As can be seen in the example from FWO above, more and more funding agencies are introducing other variables in their questions for applicants towards an intersectional perspective in the integration of the gender dimension in R&I. This important challenge for the gender dimension in R&I policies will be addressed in section 4.2.2.a) below.

A selection of examples of how funding agencies are requesting information on how sex/gender analysis is considered in research proposals can be found below:

FORTE - Sweden

“Is a sex and/or gender perspective relevant for this project? If yes, motivate your answer and describe how this is considered in the application as a whole. If you state yes, but do not include a sex and/or gender perspective in the rest of the application (description of aims, possible outcomes, methods, etc) it must be motivated. If the answer is no, it has also to be motivated”.

AEI - Spain

“Does the project design take into account possible biological and/or socio-cultural differences or similarities between women and men, either because you are doing research directly with human beings or because your applications will be used by people?”

If yes, explain how sex/gender analysis is integrated into the phases of this research

If no, please explain why.”

FWO – Belgium (Flanders)

*“Did you take the issues of **gender and diversity** into account while designing your research plan (e.g. selection of human participants and/or animals in experiments, relevance of research questions and/or results with respect to gender differences, ...)?”*

Together with the practice of including specific questions for applicants to consider sex/gender variables in their research, the most extended measures refer to training and dissemination of guidelines as a way to increase knowledge and awareness-raising: guidelines for applicants and evaluators, dissemination materials on the gender dimension in R&I available, followed by training activities for both applicants and evaluators. All these measures are necessary, especially for those RFOs with less experience on the gender dimension in R&I, but do not entail a commitment to concrete results and quality of the research funded due to avoiding any gender bias and considering both women’s and men’s needs. In other words, those initiatives that require committed changes in the structure, procedures and economic resources of the organisation are less frequent, as follows:



- A funding programme to promote specifically gender studies and the community of scholars in this interdisciplinary field is in place at AEI - Spain, FCT - Portugal and IRC - Ireland;
- financial incentives/support to promote the gender dimension in research and innovation and consider training on sex/gender analysis for the R&I team as an eligible cost both commit economic resources as well and are in place in 5 and 6 RFOs respectively;
- positive action measures to favour projects that integrate sex and/or gender are implemented at MCST - Malta, NCBR – Poland, RIF – Cyprus, and VINNOVA - Sweden;
- experts on gender are included in the evaluation committees of NCBR, NCN, RCN - Norway, TACR – Czech Republic and VINNOVA - Sweden to ensure the quality of the evaluation of the gender dimension in R&I in research proposals (see Figure 7).

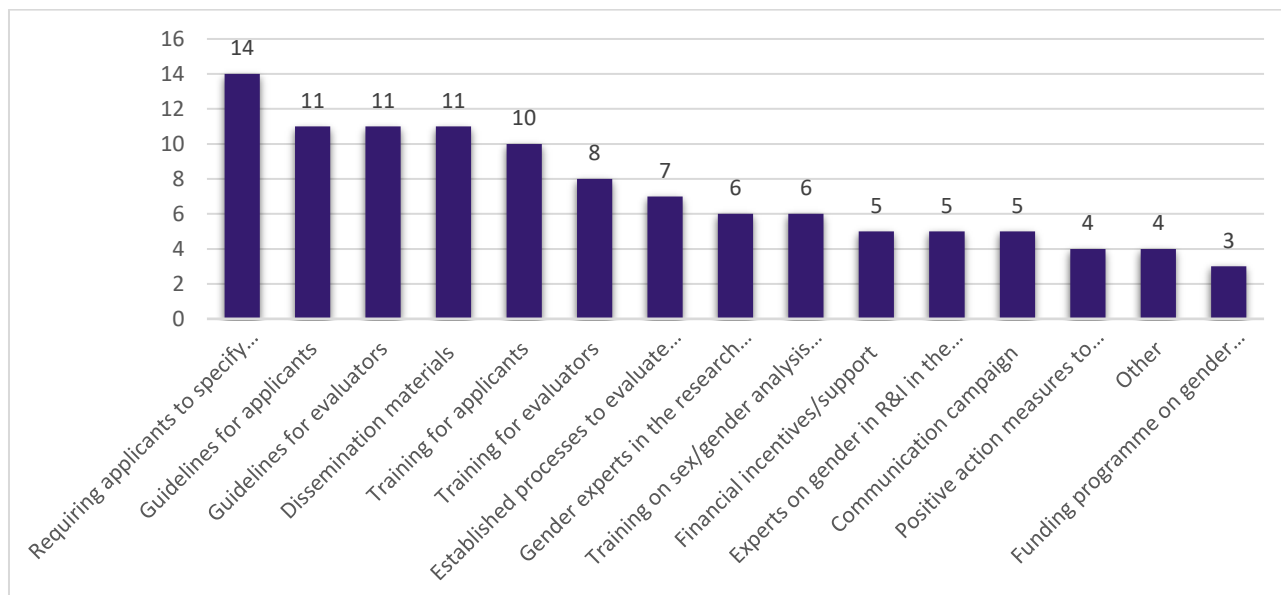
Communication campaigns to make visible the requirement of sex/gender analysis is a surprisingly underexplored action – developed only by five RFOs - despite the low cost and effort involved. This is especially striking in those cases when guidelines and materials are already available. Although the AEI had not developed any communication campaign when filling in the GENDERACTIONplus survey, a press release was published on the occasion of the 8th of March 2023 highlighting the results and the value for our society of the gender projects funded under their specific funding programme on gender studies⁸. Another action that implies a merely symbolic effort in the drafting of the calls refers to encouraging the inclusion of gender experts in the research and innovation teams, adopted only by six RFOs.

Fortunately, progress seems to have been made towards the establishment of processes to evaluate the integration of the sex/gender analysis into R&I. This question was first introduced in a former GENDER-NET Plus mapping as an indicative of the consistency of the RFO policy on sex/gender analysis. At that time, only five respondents had a formal procedure in place to ensure that the gender dimension in R&I was adequately evaluated and not only required for applicants at the beginning of the funding cycle of research projects, while the GENDERACTIONplus sample yields a result of seven funding agencies that have adapted their procedures accordingly (AEI - Spain, FRRB - Italy, NCBR - Poland, NCN - Poland, RIF - Cyprus, TACR – Czech Republic, VINNOVA - Sweden). However, it is important to note that only NCBR, NCN, TACR and VINNOVA include gender experts in their process to evaluate sex/gender analysis in research proposals, whose absence can be considered a shortcoming or inconsistency. The established process for the evaluation of sex/gender analysis is a crucial step to ensure that the integration of the gender dimension in R&I does not remain just a question for applicants with no further action in the subsequent phases of the funding cycle of research and innovation projects. Different gaps in this cycle have been identified in former reports from sister projects that have called for a consistent integration of the gender dimension in R&I through specific internal guidelines and indicators (GENDER-NET Plus, 2021).

⁸ [The State Research Agency supports eight research projects that seek to reduce gender inequality in the climate change field, in the arts and in youth and elderly groups.](#)



Figure 7. Initiatives on gender dimension in R&I among RFOs



Source: data collected through 2022 GENDERACTIONplus survey

One of the aims of WP4 benchmark is also to collect information on how RFOs address different profiles in their promotion of sex/gender analysis in R&I content. The primary target group of RFOs are usually the applicants. Most of the initiatives listed in the survey and reported by RFOs under the response “other” address directly or indirectly the role of researchers. Although most of the time when RFOs develop guidelines for applicants, they do the same for evaluators, those initiatives that require concrete efforts in the organisation to appeal target reviewers are not so extensive (see for instance the low numbers of training for reviewers, experts on gender in evaluation committees, and particularly, gender dimension in R&I monitoring indicators). This has implications for the adequate implementation of the gender dimension in R&I policies, since the greatest burden is still placed on the research application side and more lenient measures targeting evaluators entail a risk of inconsistency even if researchers do their part.

4.2.2. Addressing the gender dimension in R&I through specific policies

Until not so many years ago, it was more common for funding agencies to have several initiatives for the promotion and awareness raising of the need to integrate sex/gender analysis into R&I content, and not to have specific policies for the gender dimension in R&I. The step forward of having specific policies means that isolated, random initiatives have become a coherent, single corpus of measures that aim to meet specific objectives that are realistic after an analysis of the shortcomings in the field of gender dimension in R&I. The organisation formally commits itself to this policy and follows-up its results as part of the broader strategy of the organisation.



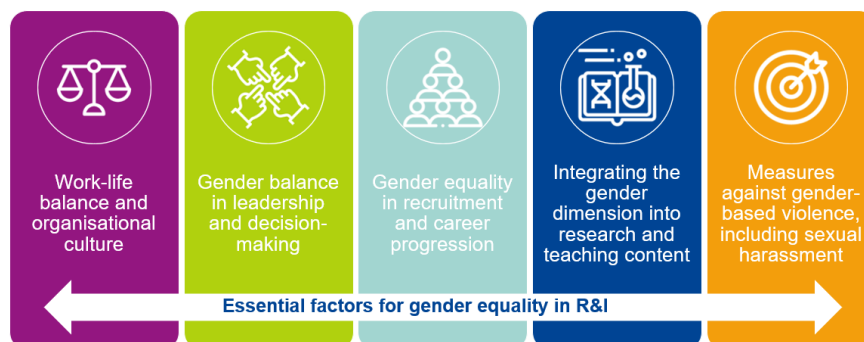
The fact that the European Commission included in 2021 the gender dimension in R&I as one of the thematic recommended areas for GEPs, and that RFOs are also called upon to approve GEPs as beneficiaries of Horizon Europe, has certainly had a tangible impact on the fields of action covered by the most recent GEPs in funding agencies, especially those coming from widening countries with no plans previously adopted (see GENDERACTIONplus Deliverable 6.1 for more information on GEPs in RFOs).

GEPs as an eligibility criterion in Horizon Europe

Having a Gender Equality Plan in place is an eligibility criterion for all beneficiaries of Horizon Europe funding from Grant Agreements signed in 2022 onwards. All public bodies and Research Performing Organisations will complete a self-declaration during the application phase stating whether they have a GEP in place covering all four mandatory process-related requirement and the five recommended content-related thematic areas.

One of these thematic areas focuses on the integration of the gender dimension into research and teaching content: *The GEP should consider how sex and gender analysis will be included in the research or educational outputs of an organisation. It can set out the organisation's commitment to incorporating sex and gender in its research priorities, the processes for ensuring that the gender dimension is considered in research and teaching, and the support and capacity provided for researchers to develop methodologies that incorporate sex and gender analysis. Research funding and research performing organisations both have a role to play in ensuring this.*

Recommended GEP content areas

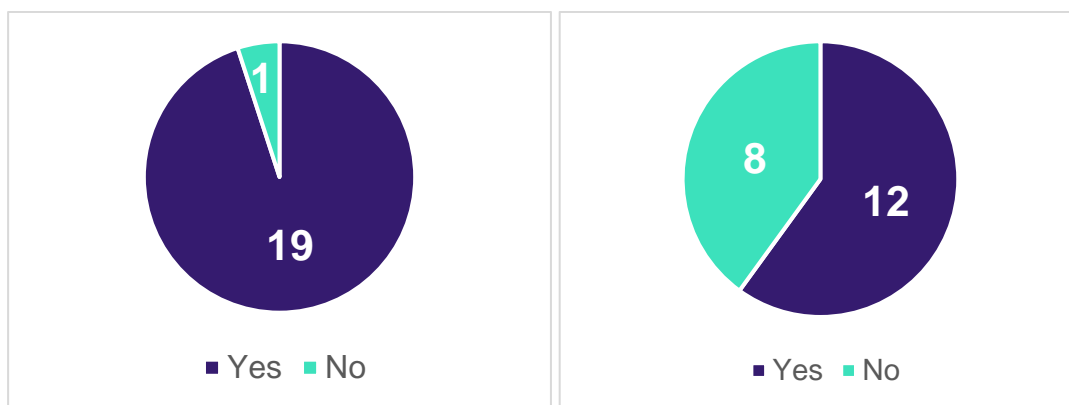


Source: European Commission, 2021.



While 95% of the RFOs respondents have already a gender equality policy in place, 60% of the sample have also adopted specific policies for integrating the gender dimension in R&I content (see Figure 8). Concretely, the RFOs' responses for specific policies on sex/gender analysis come from 8 Member States and two Associated Countries (Norway and Turkey). Four of them are widening countries (Cyprus, Czech Republic, Poland, Turkey). In all these cases, the RFOs have adopted specific strategies or policies, such as gender equality plans for this purpose. The Swedish funding agencies (Vinnova and Forte) have a specific policy for the integration of the gender dimension in R&I as part of an assignment and instructions received from the Government, which was highlighted as a promising practice in the former GENDER-NET Plus mapping. Moreover, RCN - Norway mentions their funding of Kilden genderresearch.no as part of their policy on the gender dimension in R&I.⁹ At the NCBR - Poland this policy is considered as part of the RFO internal rules and procedures, including systematic research on gender equality and non-discrimination.

Figure 8. Gender equality policies vs. gender dimension in R&I policies at RFOs



Source: data collected through 2022 GENDERACTIONplus survey

While initially 13 RFOs declared having a specific gender equality policy in place addressing the gender dimension in R&I content, a preliminary analysis of the responses and documents attached by the RFOs led to open a dialogue with seven of the respondents. By reviewing the goals of the specific policies on the gender dimension in R&I declared, one of the RFOs changed its response and concluded that they did not have a specific policy for the gender dimension in R&I while other five RFOs suggested amendments to their former explanations. As for one additional RFO, the analysts have made the decision to include it in the list of RFOs with specific policies for the purposes of the quantitative overview although the policy analysis could not be developed as in the other cases due to lack of information.

Thus, the benchmark analysis entailed a first process of dialogue on specific policies with the stakeholders involved that ended at the beginning of March 2023. The analysts approached this communication process respectfully, avoiding any judgment or attempt to change the responses.

⁹ Kilden genderresearch.no is an independent unit of the RCN that promotes and disseminate research with gender perspectives, established in 1998: <https://kjonnsforskning.no/en>



Although giving respondents the opportunity to review their respective RFO sheets (see Annex I) complicated and delayed the research process, this has ensured that our information is now more reliable and accurate. Moreover, we have given RFOs the possibility to reflect on the concept of policies for the gender dimension in R&I and to engage in the analysis.

The following is a summary of the type of policies on the gender dimension in R&I, including the framework and objectives, for each of the funding agencies:

➤ **AEI - Agencia Estatal de Investigación (Spain)**

The AEI GEP 2021-2023 was designed with the support of the European sister project [SUPERA](#) before the EC announcement related to the GEP requirement. One of the expected outcomes of this first GEP refers to “promoting a more inclusive content with respect to the gender perspective in scientific and technical proposals through the incorporation of sex and gender variables, strengthening the evaluation and monitoring processes of the projects. Although the fields of action identified by the AEI referred to the structures needed for gender equality policies and concrete areas of activity for an RFO, the gender dimension in R&I content is considered in one of these areas through the objective of promoting the improvement of the gender perspective in R&I projects submitted. This objective foresees the following concrete measures: a) to develop supporting materials for researchers on the integration of a gender perspective in the approach, method and impact of the projects; b) to analyse research project applications submitted that include and describe how the gender perspective is considered in the proposed research. As monitoring indicators for these gender dimension in R&I initiatives, the AEI has considered the no. of calls for proposals incorporating the guidelines and materials provided on the gender dimension in R&I and % of applications describing the gender perspective in the proposal (see AEI 1st GEP 2021-2023).

➤ **FRRB- Regional Foundation for Biomedical Research (Italy)**

The FRRB is a unique example in this sample because it is a regional funder focused on a specific field of biomedical research. Following the experience in European sister projects and in line with the requirements of Horizon Europe, one of the thematic areas of the FRRB GEP is “integrating the gender dimension into research content”. This area involves, among others, an action to include a focus on sex and gender in the content of the research through changes in the application forms and dedicated training. The message the organisation is sending out is appropriate and clear: “For a long time, gender equality in research has been intended as gender balance in research team. However, with the development of the studies in the field of gender medicine or gender-specific medicine, it is becoming necessary to consider the biological differences between females and males and also the gender differences, meant as the result of socio-cultural processes [...]” (see FRRB GEP).

FRRB also provides a concrete example of how RFOs address different profiles – researchers, innovators, evaluators – in this specific field of gender equality policies, which is one of the aims of



the WP4 benchmark. While guidelines for reviewers on how to evaluate gender equality in research have been formally approved by the Board and distributed, specific training for researchers has been organised with references to “gender in research activities” and “sex/gender analysis”.

➤ **FWO - Research Foundation (Belgium – Flanders)**

The FWO has implemented the gender and diversity dimension in the R&I content of all its funding schemes. FWO policy on the integration of the gender and diversity dimension in the R&I content is not laid out in a separate document but is part of its broader Gender Equality Plan. Thanks to having followed the EC scheme of mandatory process-related requirements and recommended thematic areas, there is a distinct and identifiable part of the FWO GEP dedicated to integrating the gender dimension in R&I content. However, it is the least developed part of the Plan compared to the other thematic areas. FWO has used one of its calls to require the integration of sex/gender analysis in research proposals and the objective is to extend this action to all relevant funding channels of the organisation including monitoring mechanisms.

➤ **IRC - Irish Research Council**

The IRC has a long tradition of asking applicants to indicate if there is a sex and/or gender dimension to the research proposed since 2014. The IRC Gender Strategy 2013-2020 clearly distinguishes the aim of supporting gender equality in research careers from that of promoting the integration of sex and gender analysis into research content. Seen as part of scientific excellence, sex/gender analysis constitutes an important aspect of the evaluation of proposals (see IRC Gender Strategy & Actions). Activities falling under this objective have included enabling researchers to correctly identify and recognise whether or not there is a potential sex/gender dimension in their proposed research, to provide a range of training and guidance to researchers and assessors and to include a review of the sex/gender dimension in the ongoing monitoring and review process of funded research proposals (Ortus Economic Research and Loughborough University, 2020).

➤ **NCBR - National Centre for Research and Development (Poland)**

NCBR, as an executive agency of the Polish Ministry of Education and Science, has recently developed its 1st Gender Equality Plan for the period 2022-2025. This GEP refers to the Horizon Europe provisions regarding gender equality plans and particularly to the objectives focused on women’s presence in the R&I field, i.e., gender equality in research careers and gender balance in decision-making. The NCBR policy for the gender dimension in R&I is included in this GEP under the goal “Raise awareness of the importance of equality of men and women in research”. Planned activities under this goal include: a. Identify projects for promotion; b. Identify promotional channels for equality of men and women content in research; c. Cyclical activities promoting women in scientific research. Together with a wide range of measures to integrate sex/gender analysis in place, NCBR declares to have different goals and planned actions specifically for this topic: 1. Promotional activities - presentations of projects taking into account the gender dimension in the conducted research (dissemination of good practices); 2. Training on the importance of the gender



dimension and gender balance in research addressed to particular groups: experts, beneficiaries and applicants of NCBR calls; 3. E-learning training on the importance of gender dimension in research, addressed to experts. The inclusion of the gender dimension in R&I content is part of the *infodays* and other dissemination activities connected to Horizon Europe, since this is a requirement by default.

➤ **NCN - National Science Centre (Poland)**

NCN, as an executive agency aimed at supporting basic research, has developed its 1st GEP 2022-2025 in response to the Horizon Europe eligibility criterion regarding gender equality plans. Being similar to the NCBR case, these examples illustrate the impact of the EC framework for gender & science in widening countries such as Poland. Several goals of the NCN policy refer to the gender equality provisions in research funding, such as: Goal 2 - Including gender equality aspects in the NCN application forms; Goal 3 - Emphasising the importance of gender equality in the documentation and practice of proposal review; Goal 4 - Raising awareness on the importance of equality issues and improving gender balance in Expert Teams. The NCN particularly promotes a modified proposal assessment criteria to include the gender and gender identity of studied objects. According to the GEP chart stating the correspondence of existing and planned actions with the HE recommended thematic areas for GEPs, the actions from the proposal review process to the final project evaluation contribute to the inclusion of the gender dimension in research content (see Gender Equality Plan for the National Science Centre 2022- 2025).

➤ **RCN - Research Council of Norway**

The RCN, the only national RFO in the country, is in charge of the policy for the integration of the gender dimension in R&I, as explained above. The way RCN has addressed the gender dimension in R&I in its gender policy is through the wording “gender perspectives in research and innovation” to distinguish it from “gender balance” that is also covered by the policy. “To strengthen gender integration as a dimension in R&I” is mentioned as one of the traditionally three objectives of the ERA to move gender equality in R&I forward. RCN’s ambition includes to consider the gender dimension in all programmes and initiatives, and also to identify areas with a special need of knowledge about gender perspectives in research. For this purpose, RCN promotes, among others, interdisciplinarity in calls for proposals to ensure a widely incorporation of gender perspectives in research projects and also field evaluations of Norwegian gender research to help strengthen this area of knowledge (see RCN, Policy for gender balance and gender perspectives in research and innovation, 2019).

➤ **RIF - Research and Innovation Foundation (Cyprus)**



The first RIF Gender Equality Plan adopted for the period 2018-2020 is still the main document to inform the RIF specific policy on the gender dimension in R&I. Although this design was conducted before the establishment of the Horizon Europe eligibility and award criteria, RIF dedicated a priority field of action to the gender dimension in R&I as equally important to the other priority fields. The way RIF approaches this field of action to increase excellence in research combines both measures to promote gender balance research teams and evaluation panels and capacity-building for applicants and evaluators on the importance of integrating gender analysis into research content (see Research Promotion Foundation GEP 2018-2020). Their policy on the gender dimension in R&I is incorporated in the Call for Proposals and other related documents of the organisation.

➤ TACR – Technology Agency of the Czech Republic

TACR had adopted the strategy of implementing sex/gender initiatives in pilot projects that can demonstrate the positive effects of these measures. With the support of a European sister project ([GEECCO](#)), a bonus evaluation criterion focusing on how the gender dimension was reflected in research content and its impacts was included in two funding programmes. A handbook for assessing the gender dimension in research content has been drawn up since 2019 targeting both researchers and reviewers. Having adopted a GEP recently, TACR has been able to take advantage of the EC recommendations for GEPs in the design of its 2022-2025 Gender Equality Plan. Divided into 8 sections, one of them focuses on “integrating the gender dimension into the research content”. The measures foreseen are intended to assess and adjust the bonus criterion mentioned above accordingly. To ensure success of the modified instructions on how to consider the gender dimension in research content – including understanding of the mechanism for its evaluation – training activities for applicants and reviewers will be organised.

➤ TUBITAK - The Scientific and Technological Research Council of Turkey

The current gender equality policy at TUBITAK is quite recent and the references to the Horizon Europe requirements are clear throughout the document. One of the eight objectives of the GEP for the period 2022-2025 is to enact formal mechanisms for the integration of a gender perspective in respective research fields. However, once the field of action has been described as “Integration of Gender Dimension into Research Content & Research-Based Activities”, gender balance has become too prominent in the section and the two objectives are conflated. Despite this, one of the actions under the subsection “Gender and Research” is devoted entirely to the sex/gender analysis as follows: “Ensure the integration of the gender dimension into research and innovation content by requiring all applicants to indicate whether potential sex and/or gender dimension may be present or could arise in the course of the proposed research” (see Gender Equality Plan for the Scientific and Technological Research Council of Turkey 2022-2025).

➤ VINNOVA - SWEDISH AGENCY FOR INNOVATION SYSTEMS



In order to comply with a governmental instruction and to ensure that gender perspectives are included in the projects financed by Vinnova, when applicable, a gender mainstreaming approach has been established. Vinnova's gender mainstreaming plan 2022-2025 stresses the message that innovations should be relevant to as many people as possible in society. Thus, all applicants must consider whether sex and/or gender dimensions are relevant in the project and how these will be taken into account, when relevant. Vinnova foresees to develop systematics for qualitative follow-up of sex/gender dimensions within funded projects.

The policies for the gender dimension in R&I analysed in this benchmark can be classified into different groups, as follows:

Address gender dimension in R&I through a vague and unclear manner	A distinct section with a lower development of gender dimension in R&I	A dedicated section that pays the appropriate attention to the field
<ul style="list-style-type: none"> • Clear messages and objectives absent • Gender balance and gender dimension in R&I conflated 	<ul style="list-style-type: none"> • Facilitates the understanding of these policies • The message is that other fields of action are more relevant 	<ul style="list-style-type: none"> • Clarifying messages and objectives • Specific measures and monitoring indicators

Some RFOs address sex/gender analysis in R&I content in a vague and unclear manner. Clear messages and objectives related to the content of R&I are absent from the policies adopted. In some cases, although there is a wide range of measures for the integration of gender analysis in R&I displayed at the organisation, even a solid definition of sex/gender analysis, the rationale of the gender equality policy associates the topic of the gender dimension in R&I with gender equality and gender balance issues. In this cluster of RFOs, training activities usually address gender balance and the gender dimension in R&I all together as well as guidelines for panel members. In this context, and sponsored by a funding agency, it is not surprising that researchers confuse gender balance and gender dimension in R&I in their proposals.

Other funding agencies have a distinct and identifiable section for objectives and measures to advance the gender dimension in R&I content, which facilitates the understanding of their policies, but the level of development of this field – and concreteness of measures - compared to other thematic areas is significantly lower. In reverse, at least one RFO has been able to be concrete enough in the design of measures to ensure the integration of the gender dimension in R&I in its policy while the key messages and identifiable field of action are lacking. Only TACR in this sample presents a gender equality policy that pays the appropriate attention to the gender dimension in R&I field with a dedicated section and its correspondent clarifying messages, objectives, measures and monitoring indicators specifically designed to move sex/gender analysis forward.



The above-mentioned confusion about the gender dimension in R&I content versus gender equality/balance measures is a classic in the field and a well-known obstacle faced by gender experts and practitioners in RFOs. Former reports on policies for the gender dimension in R&I already mentioned this issue as a clear shortcoming to advance this particular objective of gender equality policies in R&I (GENDER-NET Plus, 2021; Håkansson & Sand, 2021). Indeed, “clear and quality definitions of terms” has been considered the first, key aspect of a “framework to implement and evaluate policies” on gender dimension in R&I by Hunt et al. (2022). This situation should motivate RFOs to pay special attention to avoid the confusion and to develop strategies for overcoming it, taking advantage of transnational initiatives such as GENDERACTIONplus.

Indeed, how RFOs frame the discourse of gender equality in research funding deserves special attention. There is still a prominence of the “excellence” discourse among R&I systems that has been criticised by gender scholars for being a gendered concept (Van den Brink & Benschop, 2011; Bozzon et al, 2019) that favours the identification of male researchers and the traditional model of doing science with excellence. While some RFOs stress the link between sex/gender analysis and excellent research (see for instance the IRC, FWO, and the RIF and FRRB GEPs), others raise the excellence discourse somehow as an “apology” for not following the sole criterion of excellence due to gender equality policies:

“The goal of the [RFO] is to level the playing field for all researchers applying for funds, while prioritising the criterion of research excellence in the proposal evaluation process”

“[The RFO] values the principles of gender equality in all its activities without compromising on scientific excellence.”

From the perspective of GENDERACTIONplus WP4 team, RFOs do not need to make explicit and special references to “excellence” when explaining their gender equality policies as if they contradicted excellence, but rather the opposite. First, given the gendered notion – and negative gender impact – of the idea of excellence in the field, RFOs should avoid references to “excellence” and shift to a discourse of quality and ethics in research. Second, it is crucial to develop a strong line of argument towards sex/gender analysis as an integral part of quality in R&I content and practice when developing gender equality policies at RFOs.

This benchmark and its recommendations can be useful for the two RFOs that do not have yet a policy in place but are planning to design a specific policy for the gender dimension in R&I in the future, according to our survey. This is a good sign since the experience shows that once RFOs commit themselves to take further action in the framework of international collaboration, they tend to comply with the commitment, as can be seen below. However, clear guidance and promising practices are a pressing need, especially to avoid further misunderstanding regarding these particular policies to promote sex/gender analysis. As stated by one of these two RFOs: “[...] the institution is well aware of the current European discussion on this issue. However, before implementing any procedure as regards gender dimension on research content in the funding programmes, further understanding of the meaning of this criterion and procedure is required”.

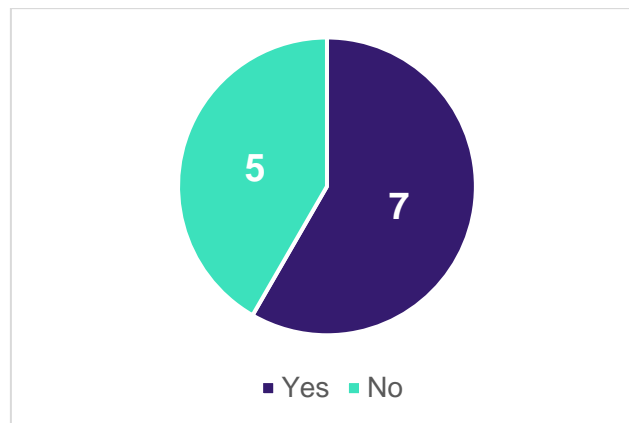


4.2.2.a) Intersectionality and innovation: Two emerging challenges

According to the description of the benchmark analysis to be conducted under WP4, it should address two pressing needs of the new ERA: 1) to systematically integrate the innovation and private sectors in the objective of producing non-biased knowledge and solutions for society as a whole and its global challenges; 2) 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. In other words, if in the previous GENDER-NET Plus mapping the challenge was to address the integration of the gender dimension in R&I throughout the whole funding cycle of research projects, the challenge of the present benchmark report is to address both the innovation sector and the intersectional perspective in the gender dimension in R&I policies. This way, gender equality policies in R&I in the ERA have become increasingly comprehensive and tailored to the needs of the R&I sector as well as to new theoretical developments in gender studies.

As for the **innovation and private sectors**, its relevance for the gender dimension in R&I content had been pointed out for years from the high-level advisory group to the EC “Helsinki Group” (ERAC 1210/19). However, the innovation and private sectors have clearly been an area in which introducing gender equality policies has experienced more difficulties. This has resulted in two fields of the R&I systems – research and innovation - at two distinct speeds when it comes to considering gender bias and women’s needs in the production of knowledge, products, or innovations.

Figure 9. Innovation and private sectors considered



Source: data collected through 2022 GENDERACTIONplus survey

Although more than 50% of the respondents with specific policies on the gender dimension in R&I have indicated that they consider the innovation and private sectors in the field (7 RFOs out of 12 with specific policies) (Figure 9), innovation gets very few mentions in RFO GEPs. In one case “Gender and innovation” has been stated as a subsection within the field of gender dimension in R&I but the content of the measure refers to promoting women researchers in technology-based entrepreneurship related calls. The RCN policy, to give another example, refers to the innovation processes that require a rich

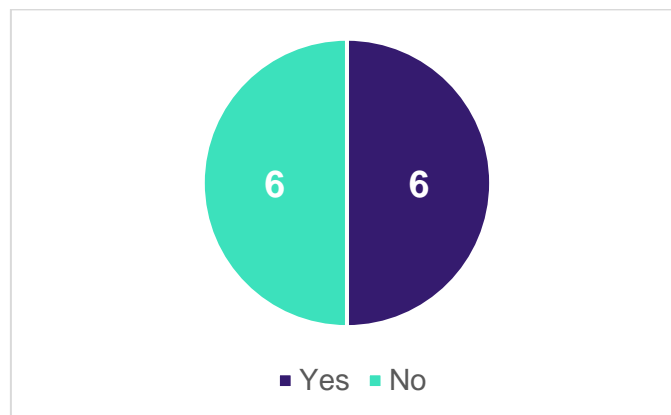


assortment of ideas and (gender) perspectives and highlights technology as an area that needs targeted measures to effectively include a gender dimension in its design and applications. Yet it is primarily the funding agencies with the strongest focus on innovation that provide valuable examples. VINNOVA, for instance, stresses the error of excluding groups in society whose needs for new solutions are not met, and supports the message that new solutions where sex and/or gender perspectives are integrated can be also economically beneficial.

Intersectionality has been one of the new developments in gender equality policies in R&I that have come out of Horizon Europe (2021-2027 Framework Programme). The implementation of policies to integrate intersectional analysis¹⁰ in addition to sex and gender into the grant proposal process is certainly more recent at the global level (Hunt et al, 2022). According to the EC framework, intersectional factors, such as racial or ethnic origin, age, socioeconomic status, sexual orientation, or disability, combine with sex and gender to shape a person’s or a group’s experience and social opportunities, thereby influencing the form of discrimination and inequality they encounter (EC, 2020). Indeed, the way a research problem is formulated will determine which intersecting variables are relevant for analysis (EC, 2022).

Overall, 6 or 50% of the funding agencies with specific policies in place have adopted an intersectional perspective to the gender dimension in R&I (Figure 10). This means that only the following six RFOs could be examples to analyse in this regard: FRRB, NCBR, NCN, RCN, TACR, VINNOVA.

Figure 10. Intersectional approach to gender dimension in R&I



Source: data collected through 2022 GENDERACTIONplus survey

Even considering the GEPs of those RFOs claiming to adopt an intersectional perspective, there is again a limited focus on the issues of diversity/intersectionality in the RFO policies. RCN, one of the two RFOs in the sample that explicitly address diversity in their policy, focuses on migration: “*The world is changing*

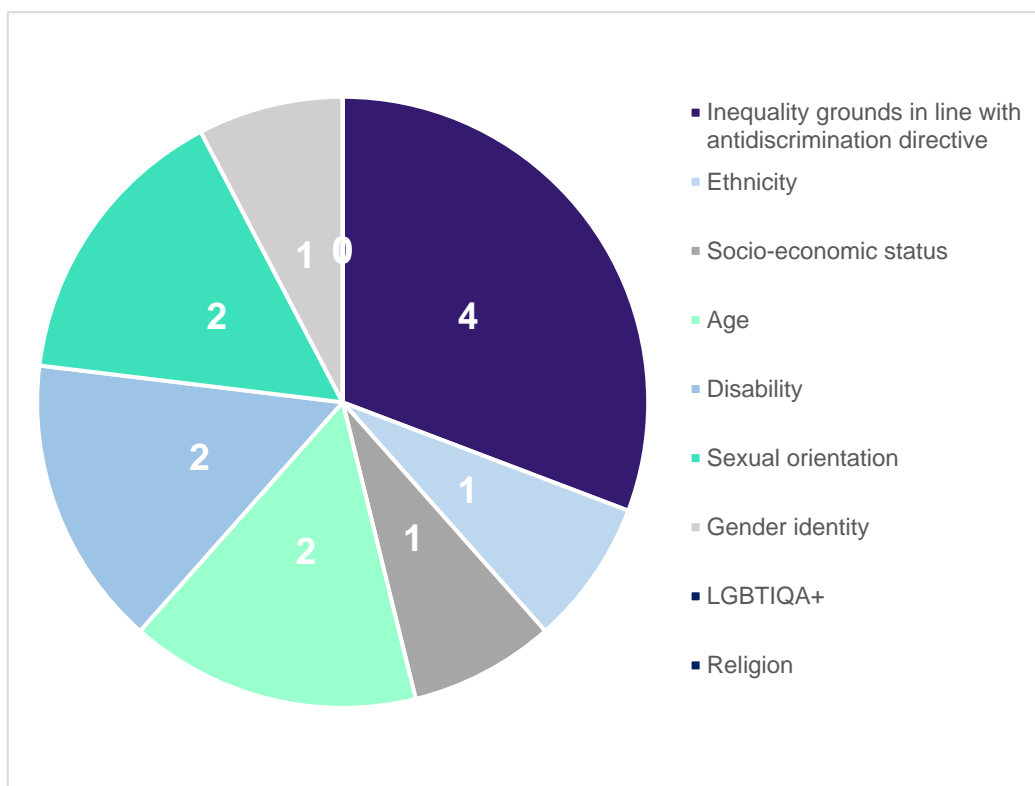
¹⁰ There is no unified term, even less an acronym, to refer to the intersectional analysis or approach. Some authors use the term “sex, gender and diversity analysis (SG&DA)” (Hunt et al, 2022) while some funders have introduced the term “Gender-Based Analysis Plus (GBA+)” (see the Canadian Institutes for Health Research). For the purposes of this report, the terminology closest to that of the EC has been followed.



and becoming more diverse. As migration increases and society in general grows more heterogeneous, gender and diversity issues are more often treated as two sides of the same coin. Although this policy specifically applies to gender balance and gender perspectives, several of the measures here will have the important effect of promoting diversity in a broader sense as well. We will also be working to expand knowledge about diversity” (see RCN Policy for gender balance and gender perspectives in research and innovation). Vinnova’s gender mainstreaming plan, in turn, aims at developing “Vinnova’s ability to work to ensure that granted projects contribute to increased equality through intersectional and inclusive measures when relevant”. This is considered an expansion of the gender mainstreaming strategy (see Vinnova, 2022). TACR, to give another example, is considering different axes of discrimination as part of the instructions for applicants and evaluators, although the GEP itself as an official policy is not that detailed.

Regarding the grounds of discrimination considered in the RFOs policies to promote the gender dimension in R&I from an intersectional perspective, most often funding agencies address inequality grounds in line with an antidiscrimination directive, i.e., all axes taken together (see Figure 11). While age, disability and sexual orientation have been considered twice as variables, religion and LGBTIQ+ issues have not been explored yet as factors of intersecting discrimination with gender in these specific policies to promote sex/gender analysis.

Figure 11. Grounds of intersecting discrimination considered by RFOs



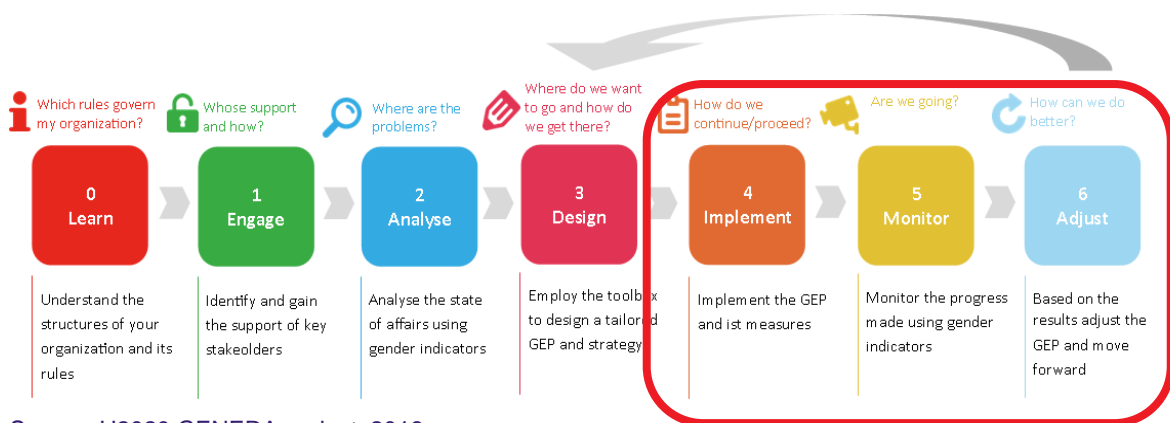
Source: data collected through 2022 GENDERACTIONplus survey



As stated in the WP2 benchmark report focused on intersectionality, the fact that analysts have found a “huge silence” regarding intersectionality in the vast majority of RFO policies needs to be considered a finding in itself (GENDERACTIONplus Deliverable 2.1). Indeed, the aspects of a policy that remain unproblematised speak volumes on how a problem is represented (Bacchi, 2012). For two decades, gender & science policies at the EU level have addressed the absence of sex/gender considerations in research as a “problem” insofar as potential differences between women and men – in terms of biological differences, applications of products, needs, etc. - were ignored. However, women – and men as well - have been considered as homogenous groups unaffected by other categories or axes of discrimination. Those intersections are being overlooked in current research and innovation (see EC, 2020). Sometimes policy analysts can conduct a mapping of policies, compare, assess, and even identify promising practices, while in other cases their role is to highlight “silences” and gaps to carry out a foresight exercise for the future.

4.2.2.b) Implementation, monitoring and evaluation of policies

Implementation, monitoring and evaluation are clearly differentiated parts of the policy cycle, each with different aims. Implementation usually starts after the approval of a policy/GEP and ensures that policies do not remain only on paper. It is the most active and dynamic part of the policies on the ground, where the feasibility of the design can be observed. The monitoring of policies will precisely check to what extent and in what ways the plan has been implemented, usually through follow-up meetings and monitoring indicators. Finally, the evaluation of a policy, normally at the end of the policy/GEP cycle, allows the organisation to draw conclusions on the process and the degree of achievement of objectives in order to introduce those lessons learned in the design of the subsequent policy/GEP.



Source: H2020 GENERA project, 2018.

Although the experience on the ground shows that there are many paths to the same end and that these phases do not always follow an exact linear sequence, it is important for less experienced agencies to take this – or similar - scheme into account and to consider each and every phase in their gender equality policies.



In order to help RFOs differentiate these phases of the policy to integrate a gender dimension in R&I, the survey specified what kind of information is expected in each of them: for the purposes of this analysis, implementation refers to the unit(s) responsible for implementing the policy, actions taken so far and structures developed for the implementation, including technical, human and economic resources; while monitoring accounts for actions and structures, if any, established to supervise the concrete actions and indicators used with their correspondent outcomes. Despite clarifications and due to these being open questions¹¹, enough information for an analysis of the implementation, monitoring and evaluation of these policies has been collected only in five cases: AEI, FORTE (only regarding monitoring and evaluation), IRC, TACR, and VINNOVA.

- **AEI - Agencia Estatal de Investigación (Spain):** In the first phase of research proposals, the AEI templates include a question on how the project will consider sex/and or gender variables. The gender dimension of the project is considered both in the scientific part of the proposal and in the socio-economic impact of the research project. Different materials - including official guidelines from the Ministry of Science and Innovation and online training - on the gender dimension in R&I are available in the AEI website to help the research staff¹². Second, the AEI distributes guidelines and training modules on how to integrate and evaluate the gender dimension in the content of research projects for the evaluators. Third, monitoring reports of funded projects include a section on the gender dimension in R&I with the following statement: *“Briefly summarise how you have considered the integration of gender analysis in research (IGAR) in the different aspects of the project: objectives, methodology, results, applications and social and economic impact”*. The independent experts of the Agency consider this information in their monitoring assessments of funded projects.

The 1st GEP of the AEI includes different indicators to monitor progress. Concretely, indicators regarding gender dimension measures include:

- Number of calls for proposals incorporating the Briefing Note on Evaluating the Integration of Gender Analysis in Research (Women and Science Unit) and other materials for applicants/total
- Percentage of applications stating and describing the gender perspective in the proposal
- Number of persons who carry out self-training activities before participating as experts

Moreover, the AEI is exploring the possibility of making the online training on how to integrate and evaluate the gender dimension in R&I mandatory for all the evaluators as part of the monitoring of funded projects.

- **IRC - Irish Research Council:** From 2014 onwards, all IRC-led funding calls required applicants to consider the sex and or gender dimension of their research. This was brought in at all levels and across all disciplines. Where applicants indicated that no sex and/or gender dimension existed, they were asked to justify this assertion. A guide of applicants has been

¹¹ One of the respondents stated that the description of these processes is too large and would require too much time.

¹² <https://www.aei.gob.es/en/ciencia-igualdad>



developed to assist applicants in understanding this dimension of their research and to aide reviewers in assessing the response.

Although to date the assessment of the sex/gender dimension is not scored, on the PI-led awards the sex-gender dimension is reviewed at the mid-point of the award to ensure that any results are in keeping with the originally proposed sex/gender considerations.

- **TACR – Technology Agency of the Czech Republic:** The strategy of this RFO to introduce policies for the gender dimension in R&I has consisted of acting on pilot programmes, concretely the ZÉTA and ÉTA programmes in 2018 and 2020 respectively. The introduction of the criterion was accompanied by the creation of a specific guideline explaining how to assess the possible role of gender and/or sex in the proposed research and how to systematically integrate a gender perspective into the project methodology, analysis of results and their application. It was also intended for those involved in the evaluation process as a basis for assessing the correctness of the applicants' accounts. The topic was also presented at seminars for both applicants and evaluators, and further instructions for both of these groups were developed. Two employees (gender experts) participated in the evaluation panels to assist in the process of the evaluation of the criterion. The fact of having the support of a European sister project and gender experts has been a success factor in the deployment of these programmes.

Since 2022, the criterion was transferred into a new programme SIGMA. All materials and instructions were revised and adapted for the SIGMA programme under the TACR GEP and training for applicants and evaluators is planned again.

The implementation & monitoring process at TACR:



Gender experts at TACR scanned all proposals and reviews and assisted in the evaluation panels. Detailed notes were taken and used to refine the instructions and approach. A short article explaining the most common problems on the part of applicants was published and the guideline was updated accordingly. Moreover, setting up a monitoring system to assess the proportion of funded projects planning to integrate the gender dimension and the real situation in the funded research is suggested in the GEP as an expected activity.

- **VINNOVA - Swedish Agency for Innovation Systems:** The strategy on the gender dimension in R&I is implemented in all phases of the R&I funding process and the responsible unit is the gender equality team at VINNOVA. Tools and instructions to assess the motivation of the applicants in answering to the mandatory question on sex/gender analysis are in place together with a support function in where all programs and calls being launched are screened to ensure that sex and gender dimension is managed correctly.



The monitoring is done with a data visualisation tool where gender data is analysed continuously, for example, the amount of granted applications that integrate sex and/or gender dimensions in their project within each program and calls. All financed projects are obligated to answer follow up questions when reporting back on project progress as well as when projects are ended. External evaluators contracted to evaluate project results and portfolios in specific programs are required to evaluate how sex and gender dimensions as well as other gender equality aspects have been performed during the project. A qualitative analysis on the answers of the mandatory question is also performed, to assess the quality and relevance of the answers, but also to identify challenges raised by the applicants in the area of sex and gender dimensions related to specific thematic areas. Benchmarking studies of these answers in relation to other RFOs in Sweden and internationally are also promoted.

Although not enough information is available from the rest of the funders, some of their answers allow to reaffirm the relevance of at least three factors to develop a professional implementation, monitoring and evaluation processes: 1) the engagement in EU funded projects on gender & science (in other words, the lack of support in this task once the initiative ends); 2) committing financial resources to support gender research, increase its visibility and its internationalisation through ERANET initiatives; and 3) the creation of gender equality structures including gender equality officer and GEP committee, among others, to ensure the GEP implementation and sustainable organisational change. Indeed, in the case of RCN, although there is not yet an evaluation of their policy for the gender dimension in R&I, the organisation monitors all the projects funded, including the gender dimension in their content, and there are statistics in place. All of them emerge as necessary elements for a sound implementation of gender equality policies in general, not exclusively for the gender dimension in R&I.

When it comes to a further important step such as the **evaluation** of the policies implemented, only three RFOs have declared to having carried out an evaluation of their policy for the gender dimension in R&I: IRC, VINNOVA, and FORTE.

First, **FORTE** has taken advantage of the continuous evaluation in order to introduce adjustments in its policy requiring applicants to consider sex/gender analysis in the research proposals. When the mandatory question for applicants was first introduced, it was followed-up by a study on how both applicants and reviewers understood this question and described/assessed the answers. The conclusion was that instructions needed to be improved in order to receive more elaborated applications in this sex/gender aspect.

Moreover, a pilot analysis was conducted to assess to what extent the research funded by Forte addresses problems related to the goals of the Swedish national gender equality policy. Preliminary results show a great potential of the research funded by Forte to contribute to concrete goals concerning gender equality in the health and economy fields. This kind of evaluation that considers the impact of a research funder on the needs and research problems posed by national gender equality policies is certainly beneficial for the coherence of gender equality policies as well as to show the value of gender research for society.

Second, the **IRC** commissioned in 2020 an external consultant to review the IRC's Gender Strategy, and as part of this work, the responses to the sex/gender dimension question over time were reviewed. A random sample of answers were examined for robustness and response rates, across all disciplines. The results of the analysis showed that answers have improved over time and that research proposals

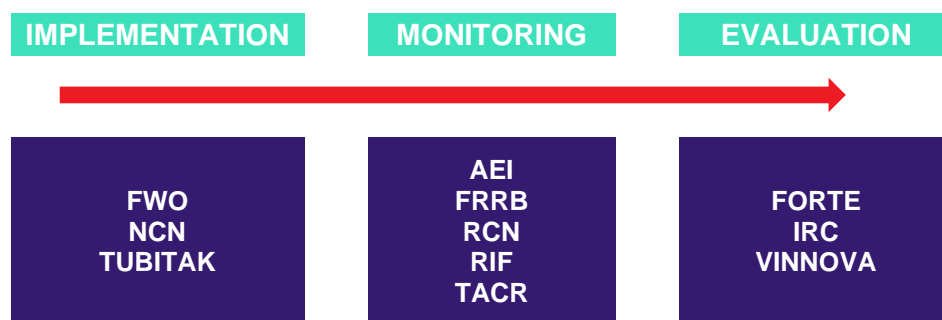


related to subjects where gender is taught at undergraduate level have a greater response rate and understanding than those coming from fields where gender has not been studied previously. Response rates were also highest amongst social sciences and humanities and lowest in physical sciences and engineering¹³.

Third, **VINNOVA** has found that its policy to promote the gender dimension in R&I had an impact on actors in the Swedish innovation system by bringing awareness and an increased demand on knowledge and training in this area. It has also increased the quality of applications and the relevance of the project results. Quantitatively, there has been a substantial increase in the number of applications which are now integrating sex and/or gender dimensions, however with varied quality.

The evaluations of the policies of FORTE, IRC and VINNOVA have revealed positive changes in terms of quantity, quality and aim of the sex/gender analysis in research proposals. Similar positive results in terms of improving the overall quality of the proposal – and therefore their chances to be funded - have been identified by other funding agencies beyond the ERA (Hunt et al, 2022). Although it is certainly too early to conduct an evaluation of the policy to integrate the gender dimension in R&I in several cases of the GENDERACTIONplus sample¹⁴, the lack of evaluation and impossibility to assess impact is a clear shortcoming in this aspect of gender & science policies. In other words, current evaluation policies of funding agencies do not support thorough analysis – involving quantitative and qualitative data – to properly assess the impact of the gender dimension in R&I policies (Hunt et al, 2022).

The phases covered so far - implementation, monitoring and evaluation - by the eleven RFOs with specific policies for the gender dimension in R&I, according to their responses in this section, can be found below:



Planning for monitoring and evaluation should be explicitly foreseen from the design stage of the policies to promote sex/gender analysis, yet only rarely a mention of it can be found in the policy documents. For example, the 1st GEP of the AEI is the only GEP adopted by an RFO considered in this benchmark that contains quite concrete information about the evaluation procedure to be followed. The AEI GEP states a calendar and mentions the actors involved in the independent evaluation of the impact of the measures adopted in the GEP, as well as other additional measures that may have been carried out during the implementation period. Indeed, “the results of this evaluation will incorporate

¹³ See Ortus Economic Research Ltd., 2020: <https://research.ie/assets/uploads/2022/03/IRCGenderPlan-s.pdf>

¹⁴ Gender equality plans adopted by institutions such as fwo, NCN and Tubitak have only recently come into force.



recommendations for the maintenance or modification of the measures and objectives adopted in the first Gender Equality Plan for the design of the II Plan” (see AEI, first GEP 2021-2023).

4.2.3. Obstacles and needs



“Initially the greatest challenge to implementing the sex/gender dimension was getting applicants and research offices to understand what was being asked. There was a lot of confusion, that still exists, as to what is meant by a sex/gender dimension. Many answers to the question focused on the breakdown of the team members and in life sciences answers tended to focus on the experimental aspects of a research project with less consideration for the end user. Language has been a challenge with “sex” and “gender” often being conflated or confused”.

One important exercise when mapping or benchmarking policies is to consider not just the results but also the obstacles institutions may encounter as well as the needs detected to move forward. Obstacles have been treated anonymously in this report although this has not resulted in a high response rate for this question. The responses come from those RFOs that have implemented specific policies for the gender dimension in R&I, which guarantees some level of experience in implementing initiatives to ensure a proper integration of the gender dimension in R&I. The experience shows that once RFOs start to develop specific policies with the potential to change preconceived ideas and established structures, challenges and obstacles arise. Indeed, the greater the gender awareness in the organisation, the more critical analysis is done.

45% of the respondents have pointed out several obstacles in the development of gender dimension in R&I policies. The quote that opens this section is illustrative of the situation in many funding agencies and extremely instructive about the need for this benchmark report and all the other activities foreseen in WP4 “Gender dimension in R&I”. It is important to note that this initial citation does not belong to a newcomer in the field. In other words, even well-experienced funding agencies still encounter confusion about what is and what is not a gender dimension in R&I, which, unsurprisingly, is also the case in less experienced funders. Worryingly, new aspects of gender & science policies such as intersectionality are expected to be developed in gender analysis while the concepts of gender dimension in R&I are still unclear. The challenge of building upon a weak foundation is considerable and entails the risk of misuse of the concepts, both on the applicants’ and on the evaluator’s side.



The lack of knowledge and expertise on the topic was precisely one of the most common challenges indicated by the respondents. As stated by one of the research funders, even when training has been provided for employees and enough information has been sent to review panels, this is an ongoing process. Moreover, the lack of knowledge on the impacts of these policies was pointed out as a shortcoming by one of the funders that regret not having detailed analyses on the impact of the sex/gender analysis required in research proposals.



“It is thought that these issues are only relevant for Human Resources policies”

With regard to different profiles of the R&I system, the lack of knowledge on sex/gender analysis among evaluation panels is a clear shortcoming when developing consistent policies to integrate the gender dimension in R&I. One of the respondents experienced troubles in the subsequent phase of the evaluation of proposals due to these uneven skills and competence: *“Reviewers often had massively different experience and knowledge in dealing with these questions. This imbalance is one of the reasons the question was not scored as part of the review”*.

As expected, **resistances** have been pointed out by respondents and they come from the three main profiles involved in the funding cycle (top management, researchers and evaluators) what entails a significant barrier for the organisations and especially for promoters of gender equality within the organisation. Lack of support from top management has been raised once and another RFO mentioned resistance from researchers. One of the well-known arguments against requiring sex/gender analysis in the proposals phase refers to the complexity and bureaucracy it adds to the process. At least one organisation received rejection from evaluators to collaborate in this task due to the introduction of sex/gender analysis criteria, what increases doubts internally and entails another form of resistance. A different funder reported as a hindering factor the view among some members of review panels that research applications should be assessed exclusively on scientific quality and that gender dimension in research is therefore not an eligible criterion in itself, which brings us back to the idea of excellence discussed above.



“Sex/gender analysis is seen as ‘another gender criterion’ with a complicated design. Indeed, ‘why should applicants explain why something is not relevant to their research?’”

Finally, expressed as a challenge, one of the agencies commented on the hard work that building competence among the staff, evaluators and applicants entails, to understand the topic and integrate sex/gender analysis in their project. On a more positive note, one agency has experienced an increase in the number of

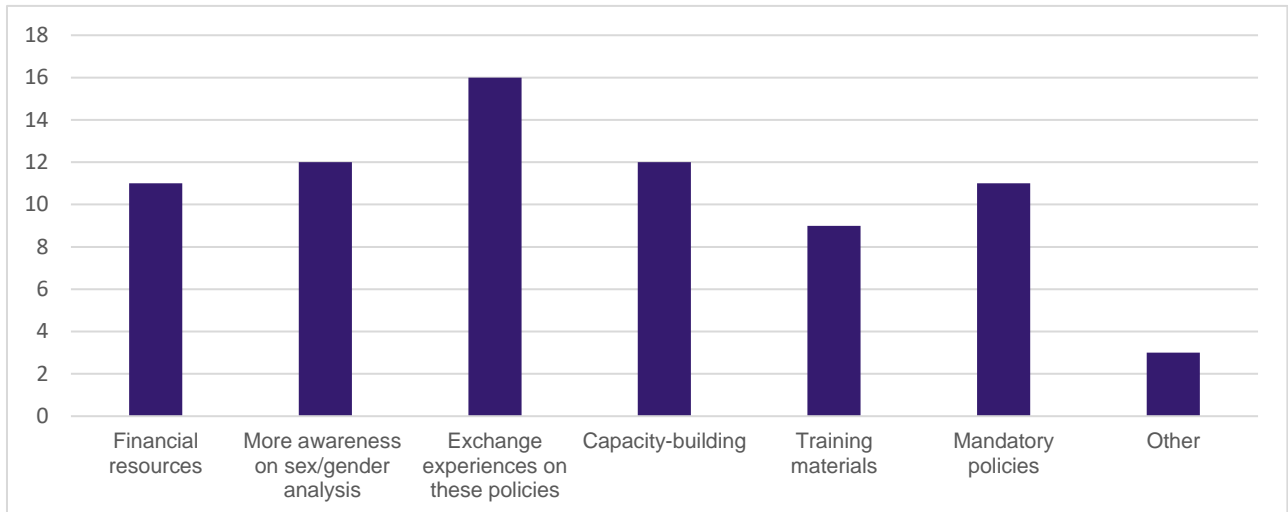
applications that include a gender dimension in R&I content as a result of their policies without major barriers.

Given the above description of barriers and obstacles, funding agencies have expressed several needs to advance their policies on the gender dimension in R&I. More than 50% of the sample considers that financial resources and mandatory policies such as conditional funding are a current need to advance gender dimension in R&I policies. 60% of the respondents require long-term measures such as capacity-building and more awareness on the relevance on sex/gender analysis for R&I, while 80% of them demand exchange of experiences on how to consider the gender dimension in R&I from an



intersectional perspective (Figure 12). This last data should be interpreted as a clear demand in view of the challenge posed by intersectionality in this field.

Figure 12. RFO needs to advance the gender dimension in R&I



Source: data collected through 2022 GENDERACTIONplus survey

4.3. EVOLUTION OVER TIME

Thanks to the efforts conducted in former sister projects, the mappings of gender dimension in R&I policies in the ERA could be updated every few years. The ERANET GENDERNET developed a first mapping of initiatives on sex/gender analysis in 2015 based on a survey. Five years later, the ERANET Cofund GENDERNETPlus circulated a similar but refined survey among consortium members and organisations belonging to Science Europe that served as a basis for the 2021 mapping carried out by the project. The GENDERACTIONplus WP4 team decided to keep several questions already posed to funding agencies and national authorities in the 2022 survey launched within the new consortium¹⁵. This has made it possible to compare developments of the gender dimension in R&I policies in nine RFOs over the last two years. Moreover, the information provided by five funding agencies can be tracked from 2015 to 2022 since they were part of the GENDERNET sample (see Table 3).

¹⁵ While compared to GENDER-NET Plus, this benchmark loses information from countries such as Germany, Netherlands, and France, information from new countries belonging to the widening objective of the ERA has been reached (see for instance, Bulgaria, Lithuania, Malta, Poland, Romania and Turkey). In some cases such as Italy, the GENDERACTIONplus mapping lost information from the national authority but got responses from a funding agency (FRRB).



Table 3. Sample included in 2022, 2020 and 2015 surveys on gender dimension in R&I policies

Country	Institution	GENDERACTIONplus sample (2022)	GENDERNETPlus sample (2020)	GENDERNET sample (2015)
Belgium-Wallonia	FNRS	✓	✓	✓
Cyprus	RIF	✓	✓	✓
Czech Republic	TACR	✓	✓	
Denmark	DFF	✓	✓	
Estonia	ETAg	✓	✓	
Ireland	IRC	✓	✓	✓
Norway	RCN	✓	✓	✓
Spain	AEI	✓	✓	✓
Sweden	Forte	✓	✓	

Source: data collected through 2022 GENDERACTIONplus survey and GENDER-NET Plus 2021 report.

The results of the comparison over the last two years do not show a clear trend towards advancement regarding the gender dimension in R&I policies. This leads to the need to assess the success factors of the involvement of funding agencies in transnational activities related to gender dimension in R&I, since sometimes funding agencies experience a significant advancement during this exchange and others a worrying stagnation.

First, there is a group of funding agencies whose status in terms of the existence of specific policies for the gender dimension in R&I and the number of measures on sex/gender analysis has not experienced any significant change in recent years and continues to be modest. On another side, two well experienced funding agencies, RCN - Norway and the IRC – Ireland¹⁶, have been able to keep up the pace of gender equality policies in the field of gender dimension in R&I and continue to be a reference for less experienced RFOs. It is yet to be seen whether these more experienced agencies – already

¹⁶ The decrease in the number of initiatives to promote the gender dimension in R&I observed in the IRC responses (see Figure 13) has been attributed to potential changes in the interpretation of the listed measures by different respondents rather than to less commitment in the organisation.



involved in the ERANET GENDER-NET - will also be able to provide the keys to advance challenges such as intersectionality in the gender dimension in R&I content in the updating of their policies, which were both designed before 2020.

Moreover, there are three funding agencies whose evolution deserves special mention due to their dynamism:

TACR – Czech Rep. was already highlighted as a promising practice by former GENDER-NET Plus mapping although it was considered a newcomer without previous experience in transnational activities in the field and specific policies for the gender dimension in R&I. In only a few years, the organisation has been able to consolidate its pilot programmes to promote sex/gender analysis and embed their wide range of initiatives in a formal gender equality policy. Indeed, TACR had advanced in former GENDER-NET Plus survey its plans to transfer the pilot programme for the evaluation of the gender dimension in R&I also in other programmes. Moreover, there has been an increase in the number of initiatives on sex/gender analysis performed by TACR since 2020, including specific communication campaigns and the inclusion of training on sex/gender analysis as eligible cost in projects funded (see Figure 13).

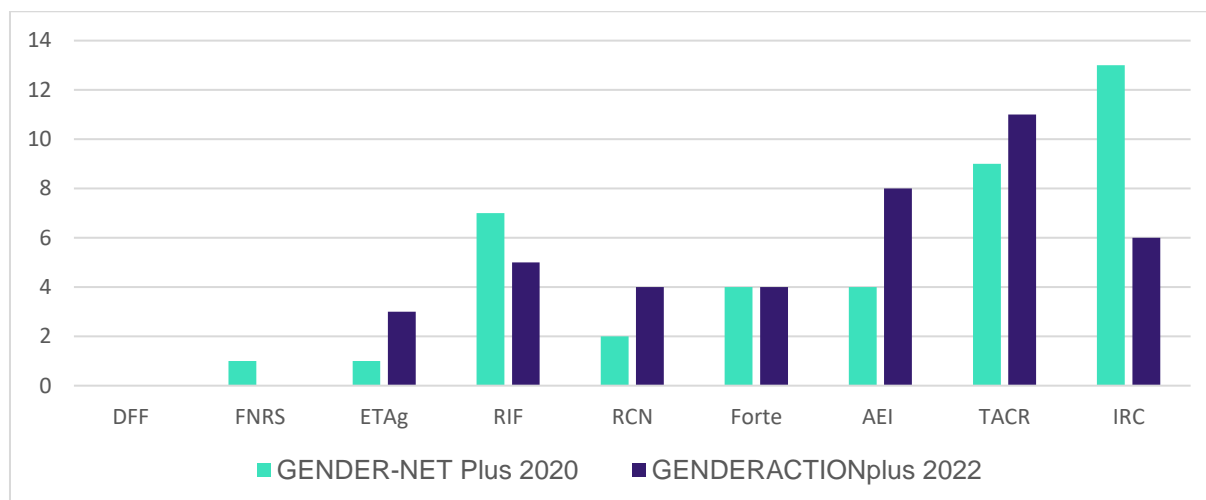
The **AEI - Spain** was already involved in the ERANET GENDER-NET but as former Ministry of Economy and Competitiveness in charge of funding programmes at national level. The AEI was established as an independent agency only in 2016. Thus, this RFO has been able to take advantage of its involvement in sister projects and also of several developments at national level regarding gender & science policies to emerge as a potential player in Southern Europe. There has been an increase in the number of initiatives on sex/gender analysis performed by the AEI since 2020, including specific training for different stakeholders, established processes to evaluate sex/gender analysis and monitoring indicators on the gender dimension in R&I for funded projects (see Figure 13). Moreover, as advanced in former GENDER-NET Plus survey, the AEI has nowadays a gender equality plan that includes measures to promote the gender dimension in R&I.

Both examples, TACR and AEI, show that once RFOs declare to be committed to move forward these policies, they take decisive steps.

While an increase in the number of initiatives on sex/gender analysis cannot be observed in the case of FORTE (see Figure 13), the fact that FORTE has now a gender equality policy that has been evaluated can be considered a qualitative leap for this organisation.



Figure 13. Initiatives on gender dimension in R&I



Source: data collected through 2022 GENDERACTIONplus survey and GENDER-NET Plus 2021 report.

Another important aspect to note from the comparison between the two mappings is the involvement of several “newcomer” RFOs from Widening countries that have been included in the 2022 mapping and have recently developed their gender equality policies as a result of the Horizon Europe eligibility criterion for GEPs. See for instance, the GEPs approved by NCBR – Poland, NCN – Poland, and TUBITAK – Turkey, that include their initiatives to promote the gender dimension in R&I content. While only three Widening countries were represented in the GENDER-NET Plus mapping of RFO policies, the fact that the GENDERACTIONplus survey has covered eleven funding agencies from Widening countries has set an important precedent. Future mappings will be able to also compare the evolution of gender dimension in R&I policies among a number of funding agencies from Widening countries and assess the EC objective of closing the widening gap in terms of gender equality policies and structures in place.

5. PROMISING PRACTICES

As the findings from the benchmarking survey summarised in previous chapters show, only a small proportion of national authorities participating in the survey currently have specific policies or strategies addressing sex/gender analysis in R&I content. In case such policies or strategies are in place, their implementation is realised by activities attributed to public RFOs of a respective country. In the case of RFOs, the current terrain of policies, strategies and measures seems to be much more diverse. There are substantial differences in the extent to which individual RFOs address the issue of the integration of sex/gender analysis into R&I content, as well as differences in concrete actions performed. The survey data collected, along with a number of policy documents analysed, allowed to conduct some comparison as well as identification of practices that can be seen as “promising”.



The very question of what can be understood as a “promising practice” is not as straightforward as it may seem. As already the authors of the GENDER-NET Plus report (see GENDER-NET Plus, 2021) show, following a report Mainstreaming gender into the policies and the programmes of the European Union and EU member states (EIGE 2013), apart from the term “promising practices”, also such terms as “good” or “best” practices are commonly used, often interchangeably. The report by EIGE (2013) focuses primarily on good practices, while it defines a “good practice” as “a practice that, upon evaluation, demonstrates success at producing an impact which is reputed as good, and can be replicated” (p. 10). Based on an overview of various operational definitions used by different organisations, the authors of this report noticed that the concept of “best practices” implies a certain hierarchy of methods. Compared to it, “good” and “promising” practices seem to acknowledge better that “each situation requires a different approach” (p. 12).

In relation to the above and following the definition by the United States Agency for International Development, “promising practice” can therefore be defined as a practice that produces results “deemed as valuable“, however, evidence of its success is inconclusive or partial, and its replicability in different settings may be limited (EIGE 2013: 11-12). Similarly, according to Fazal et al. (2017), it is a practice that shows potential, even though evidence about its positive outcomes is limited in duration or bound to some specific setting and not yet confirmed by a systematic evaluation.

As far as promising practices in the field of promoting the integration of sex/gender analysis in R&I are concerned, the criteria for their identification may share some features with a definition of good practices in mainstreaming gender into policies and programmes more general (see EIGE 2013: 12-15). Attention should be paid, for example, to their relevance, transformative value, consistency with relevant policy priorities, comprehensive implementation mechanisms or efficiency. In the context of promoting the integration of sex/gender analysis in R&I, the concept of “promising practices” might be especially useful, as there are various recommendations on how to address this area (e.g. those formulated Gendered Innovations (EC 2020)), but real experience with their implementation is rather scarce. Despite the limited transferability of some “promising practices” into other contexts, they may still provide a valuable learning experience and opportunity for transforming other settings after a further adaptation.

5.1. Identified promising practices among national authorities

As already described above, only a few national authorities have specific policies aimed at integrating sex/gender analysis into R&I content or at promoting sex/gender analysis in university-level curricula. Therefore, only several examples of promising practices can be highlighted in this case:

A good example of an **initiative at a national level aimed at integrating sex/gender analysis into R&I content** having an impact on the whole research ecosystem is the **Swedish governmental directive**¹⁷ imposing an obligation to governmental research funders – especially Swedish Research Council – to work to ensure that sex/gender dimension is considered in funded research. This directive was highlighted as a promising practice in former GENDER-NET Plus mapping. RFOs themselves are responsible for organizing, implementing and monitoring the work and activities performed on integrating

¹⁷ Förordning (2009:975) med instruktion för Vetenskapsrådet



the gender dimension in R&I (for more information about some promising practices from these areas among Swedish RFOs, please see another subchapter).

While usually, the activities for promoting the integration of sex/gender analysis into R&I content are delegated to research funders, a complementary model can be observed in the Czech Republic. The Czech Ministry of Education, Youth and Sports supports and partially funds the **Center for Gender & Science**, which is a research department of the Institute of Sociology of the Czech Academy of Sciences (ISAS). Apart from other activities, the Centre runs activities addressing the integration of sex/gender analysis in R&I, such as the web section One Size Does Not Fit All. This portal introduces the issue and provides examples from various disciplines.¹⁸ The Centre also organises lectures on the gender dimension in different fields, delivers trainings to RPOs and provides e-learning modules as part of its capacity building activities. It also cooperates on the matter with Czech RFOs. A similar initiative can also be observed in Norway. **Kilden** genderresearch.no, which is a professionally independent unit of the Research Council of Norway, serves as a national knowledge centre for gender perspectives and gender balance in research. It produces various publications and policy briefs and disseminates existing research integrating the gender dimension.¹⁹

Another example that can be highlighted as a promising practice at a national level, comes from Belgium. To symbolically support the attention given to the importance of integrating the gender perspective in research, the Ministry of the Wallonia-Brussels Federation takes advantage of the institution of awarding prizes. It awards prizes for important research works in gender studies²⁰, and every year, the Women and Science Committee of the Academy of Research and Higher Education (ARES) also awards prizes for research successfully integrating the gender dimension.²¹ These activities are part of the action plan *Droits des Femmes 2022–2024* adopted by the government.

The level of activity among national authorities in the area of policies aimed at promoting sex/gender analysis in university-level curricula seems to be relatively low so far. An example of an identified promising practice comes also in this case from Wallonia-Brussels Federation, Belgium. Its action plan, *Droits des Femmes 2022–2024*, includes a commitment to adapt the curricula in health professions or human sciences professions (psychology, human resources, communication, law, etc.) so that they integrate the gender dimension and a commitment to raise awareness among academic actors. Minimum content requirements should be defined, or even inter-university certificates created, in the future. The main responsibility for this task is attributed to the Academy for Research and Higher Education.

In the *Décret définissant la formation initiale des enseignants*, adopted by the government, attention is also paid to the instruction of future teachers, the integration of the gender dimension into their training (especially didactic and pedagogical training and training in human and social sciences). The proposal for minimum content to be integrated into the teacher training programmes has been drafted by the

¹⁸ <https://genderaveda.cz/jedna-velikost-nestaci/>

¹⁹ <https://kjonnsforskning.no/en>

²⁰ <https://www.femmes-sciences.be/prix-cfs-du-master-de-specialisation-en-etudes-de-genre>

²¹ <https://www.femmes-sciences.be/prix-de-la-recherche-2022-genre-et-environnement>



Academy for Research and Higher Education's Commission on Gender in Higher Education and the Women in Science Committee.

5.2. Identified promising practices among RFOs

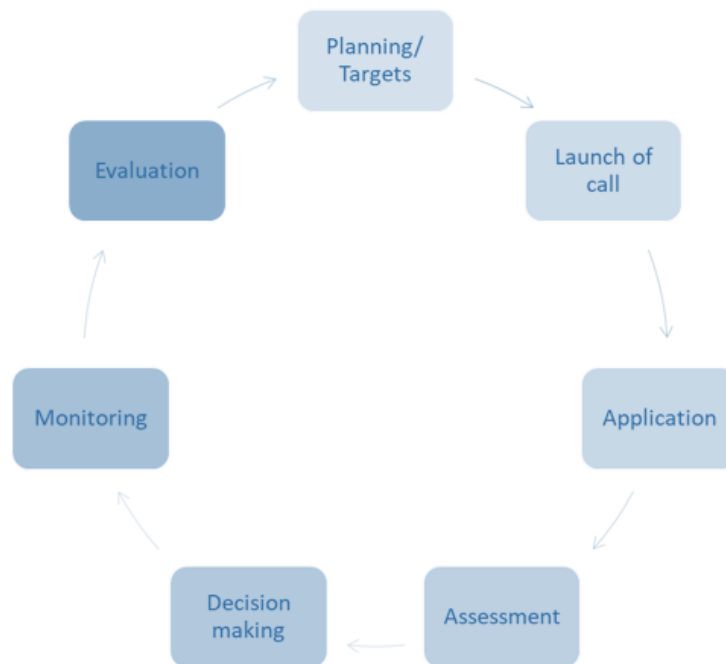
As outlined above, in comparison to national authorities, quite a substantial proportion of RFOs that participated in the benchmarking survey already have specific policies or policy measures in place addressing sex and gender analysis in R&I content. Some of them are also implementers of their respective national policies. There are, nevertheless, important differences among individual RFOs in the level of attention given to these issues, as well as the concrete practices they perform to ensure the integration of sex and gender dimension in R&I content. While some of these practices are shared by most RFOs (such as asking applicants to specify in their proposal whether and how they consider sex and/or gender in their research), others are less established. This chapter will focus primarily on the following aspects: Firstly, it will present the most systematic approaches on the part of RFOs aiming to promote the integration of the sex/gender analysis in R&I throughout the whole funding cycle (which may even be seen as “best practice”). Secondly, the attention will turn to promising practices of RFOs in the field of monitoring and evaluation of the implementation of policies for the integration of sex/gender analysis in R&I – practices that are still rather rare.

5.2.a) *Comprehensive addressing of sex/gender analysis throughout the funding cycle*

The implications of the requirement to integrate the sex and gender analysis for research projects are often far from marginal, as a substantial change in how researchers think about the concept of their research and its methodology is needed. Achieving such a change, therefore, presupposes a complex approach. Similar is also the situation of evaluators of proposals (usually researchers themselves). In most cases, this is an ongoing learning process that has to be actively supported by targeted steps of RFOs in different stages of the funding cycle. At the same time, the attention paid to the individual phases of the funding cycle enables possible modifications of interventions by individual RFOs and, thus, the greatest possible achievement of the set goals.

The phases of the funding cycle that are relevant from the perspective of possible interventions promoting gender equality and integration of the gender dimension in the content of research can be portrayed as follows:





Source: Gender Equality in Academia and Research, 2022 (online version)²²

Even though there are partial differences in the description of the stages of this cycle by various authors (which may also reflect local or contextual specificities), general conclusions based on different mappings of actions performed by RFOs to support the integration of sex and gender analysis in research show that the cycle is covered highly asymmetrically (GENDER-NET Plus, 2021; Håkansson, Sand 2021; Hunt, Nielsen, Schiebinger 2022). For example, both the GENDER-NET Plus survey (GENDER-NET Plus, 2021) with 17 participating RFOs and the analysis of policies of 22 RFOs across six continents by Hunt, Nielsen and Schiebinger (2022)²³ show that more common are those actions addressing the stage of the launch of the call and submitting of applications, followed by measures directed the assessment stage (especially providing guidelines for evaluators). On the other hand, the monitoring and evaluation phases are covered the least.

The benchmarking survey performed as part of the GENDERACTIONplus project, whose results this report presents, assessed the comprehensiveness of the actions taken to promote the integration of the gender dimension into R&I based on the list of indicators partially mirroring the GENDER-NET Plus survey to enable the comparison of the results (see GENDER-NET Plus, 2021: 44-45). This list included:

²² <https://eige.europa.eu/gender-mainstreaming/toolkits/gear/gender-sensitive-research-funding-procedures>

²³ The authors developed a framework for the analysis of the status of implementation and evaluation of RFOs' policies focusing on how they address the five following aspects: definition of terms; proposal guidelines for applicants; instructions for evaluators; trainings for applicants, evaluators, and staff; evaluation of policy implementation. Each of these aspects were further divided into five components, based on which the success of policy implementation by individual RFOs was assessed.



- **The stage of launching a call:** possible practices to promote sex and gender analysis in research may be encouraging the inclusion of gender experts in R&I teams in the text of the call or considering training on sex and gender analysis for the team as an eligible cost.²⁴
- **Application:** requiring applicants to specify in the application form whether and how they are considering sex and/or gender in their proposal, guidelines on the gender dimension of R&I for applicants and training.
- **The stages of assessment and decision-making:** established processes to evaluate the integration of the sex/gender analysis into R&I (i.e., as part of the institution's mandate and through well-established guidelines on the evaluation), guidelines and training on the gender dimension of R&I for evaluators, the inclusion of experts on gender in R&I in evaluation committees, positive action measures to favour projects that integrate sex and/or gender (such as specific weights to this criterion or its use as a factor if more projects get the same score).
- **Monitoring and evaluation:** In this case, the exact practices performed by RFOs were surveyed through open questions. However, these practices include, in general, the usage of various indicators and monitoring and evaluation tools able to show the impact of introduced policies or strategies, such as the proportion of proposals including sex and gender analysis, number of publications from funded proposals using sex and gender analysis, number of applicants, evaluators and staff who engaged in training, specific questions in reporting templates during the project implementation and at the end of project time.
- Apart from the individual stages of the funding cycle, we focused on **communication and dissemination activities** on the part of RFOs aimed at explaining what is meant by integrating the sex and gender analysis and why it is important, providing good examples, disseminating available materials (videos, academic papers, leaflets) etc. These activities accompany the process of implementing the strategy for promoting the sex and gender analysis in several stages of the funding cycle.
- We were also interested in **other activities** (financial incentives/support to promote the gender dimension in R&I or whether RFOs have a specific funding programme on gender studies in place). In addition, RFOs could describe any further activities they perform that had not been mentioned in the questionnaire.

As shown in previous chapters, the order of common and not-so-common practices roughly corresponds with the results of earlier surveys. The most common practices among RFOs represented in the survey were: requiring applicants to specify in the application template whether and how they are considering sex and/or gender in their proposal, guidelines on the gender dimension of R&I for applicants and evaluators and dissemination of available materials on the topic. The least common practices were those classified above as “other activities” and also some of those related to the stages of assessment of proposals and decision-making (positive action measures to favour proposals integrating sex and/or gender, inclusion of experts on gender in R&I in evaluation committees). Nevertheless, those related to monitoring and evaluation were also very rare. This is problematic, as **monitoring and evaluation are important for ensuring the real impact of the measures to promote sex and gender analysis on the outcomes of R&I and continuous optimization** of the setting of these measures.

²⁴ This stage is preceded by the planning stage – the programme and call development – whose results are, nevertheless, identifiable in the processes that follow. Therefore it is not presented here separately.



Below will be presented the approaches of RFOs from our sample that most comprehensively cover all phases of the funding cycle, by which they support the actual integration of the gender dimension in the content of research projects they fund²⁵:

VINNOVA (Sweden)

VINNOVA has a specific policy supporting promotion of sex and gender analysis R&I, which is part of an assignment and instructions received from the Swedish government. Its actions address all phases of the funding cycle.

In the phase of **launching** its calls, it encourages inclusion of gender experts in R&I teams in the text of the call and defines training on sex and gender analysis for research teams as an eligible cost.

In the stage of research proposals' **application**, it requires applicants to specify (with the help of provided materials, tools and training) in the application form whether sex and/or gender dimensions are relevant in the project and how these will be taken into account during the implementation of the project.

As for the stages of **assessment and decision-making**, VINNOVA meets all indicators for this area used in the benchmarking survey: it has established processes to evaluate the integration of the sex and/or gender analysis into R&I, guidelines and training on the gender dimension of R&I for evaluators, it includes experts on gender in R&I in evaluation committees and it also has positive action measures to favour projects that integrate sex and/or gender.

VINNOVA also belongs to one of few RFOs that pay substantial attention to the stages of **monitoring and evaluation**. It monitors the share of funded projects integrating sex and/or gender dimensions in each funding programme and call (the quality of the applicants' answers concerning the relevance of sex and/or gender analysis in their projects is also screened qualitatively). Through reporting templates filled by R&I teams during the implementation of projects and at their end, the information about the status actual of integration of the gender dimension is collected. The monitoring is in part performed with a tool for analysing and visualising data. In addition, external evaluators of projects' results are required to focus on these aspects.²⁶

AEI – Agencia Estatal de Investigación (Spain)

The AEI can be seen as another example of an organisation with a promising approach, as its activities cover almost all stages of the funding cycle. Even though there is still some space for enriching the approach, all of the stages are addressed solidly (except for evaluation, in which case the process is evolving, building on a complex structure for monitoring). The activities of AEI are embedded in its first GEP for 2021–2023.

In the stage of **application**, AEI requires applicants to specify in the application form whether and how they are considering sex and/or gender in their project (both in the scientific part and the part dedicated to the socio-economic impacts of the project). The quality of the inclusion of the gender dimension in

²⁵ Although also some other RFOs reported in the closed questions of the benchmarking survey that they perform activities covering individual phases of the funding cycle, they did not provide any further specification, as required, or their answers were more related to their support for gender balance in various areas.

²⁶ More information about VINNOVA's promotion of sex and/or gender analysis in R&I projects can be found on its webpage: <https://www.vinnova.se/m/jamstallid-innovation/>



the research content is supported by the guidelines created by the Ministry of Science and Innovation and video training.

The stages of **assessment and decision-making**: The AEI has a formal procedure in place to ensure that the gender dimension in R&I is adequately evaluated and provides guidelines and training modules to evaluators.

Monitoring and evaluation: AEI's approach can be seen as a positive example because of its stress on monitoring the impact of the measures introduced (which will allow for performing evaluation in future). The AEI monitors the integration of the gender dimension in funded projects (by requiring the information in its monitoring templates and asking evaluators to focus on it in their assessment). It also uses several indicators to monitor the gender dimension in its funding activities (for more details, please see the following section on monitoring). Evaluation and refining of the process based on its results is foreseen by the organisational GEP.²⁷

TACR (Czech Republic)

TACR's activities focusing on the integration of the gender dimension in R&I started as part of the EU-funded project GEECCO and are currently embedded in its GEP for 2022–2025. So far, they have been limited to selected funding programmes and calls.

The stage of launching a call: In the case of selected calls, TACR encouraged inclusion of gender experts in R&I teams in the text of the call and defined training on sex and gender analysis for research teams as an eligible cost.

Application: Similarly to other RFOs, also TACR requires applicants to specify in the application form whether sex and/or gender dimensions are relevant in the project and how these will be taken into account during the implementation of the project. To support the understanding of this requirement and a systematic integration of the gender dimension in projects, TACR distributes its guideline, provides other materials and videos and present the topic at seminars for applicants.

The stages of assessment and decision-making: TACR has established processes to evaluate the integration of the sex and/or gender analysis into R&I, it provides guidelines and other materials for evaluators and presents the topic as seminars for this group. It includes experts on gender in R&I in evaluation committees.

Monitoring and evaluation: Monitoring and evaluation processes and structures are not yet fully established; however, a plan to develop them is part of TACR's GEP. Nevertheless, in the case of the already-closed calls, gender experts at TACR scanned all proposals and reviews, and based on them, they identified the most common issues on the part of applicants and evaluators. They published a summary on TACR's website and updated the instructions and guidelines accordingly.²⁸

²⁷ More information about AEI's promotion of sex and/or gender analysis in R&I projects can be found on its webpage: <https://www.aei.gob.es/en/science-equality>

²⁸ More information about TACR's promotion of sex and/or gender analysis in R&I projects can be found on its webpage: <https://www.tacr.cz/en/gender-in-the-content-of-researchand-innovation/>



5.2.b) Monitoring and evaluation of the implementation of policies for the integration of sex/gender analysis in R&I

As indicated above, different mappings of actions performed by RFOs to support the integration of sex and gender analysis in research show that the stages of monitoring and evaluation still belong to those (from the funding cycle) that are addressed by RFOs the least (GENDER-Net Plus, 2021; Håkansson, Sand 2021; Hunt, Nielsen, Schiebinger, 2022). Nevertheless, actions related to monitoring and evaluation (including corresponding structures) are essential to ensure progress and achieve the set goals. *If objectives are not indexed on relevant progress, success or outreach indicators, it is difficult to assess whether the organisation is actually being transformed. This might also reduce the commitment of stakeholders to meeting those objectives. Having an appropriate monitoring and evaluation plan in place, however, can support the effective implementation of measures, ensure accountability, and enhance your knowledge and understanding of ongoing changes* (Gender Equality in Academia and Research 2022, online). Below, the concrete promising practices in the field of monitoring and evaluation identified in the benchmarking survey are presented.

PROMISING PRACTICES RELATED TO THE MONITORING OF THE IMPLEMENTATION OF POLICIES

According to Wroblewski and Eckstein, monitoring refers to “a continuing function that uses the systematic collection of data on specified indicators to provide management and key stakeholders of an ongoing intervention with indications both of the level of progress and achievement of the objectives as well as the use of any allocated funds” (2018: 3). Therefore, the element that is key in this process is appropriate indicators. Given the complexity of the issue of the gender dimension in R&I and the need to be able to apply the measures in various R&I fields, the very construction of indicators is a relatively sophisticated operation. Several examples of promising practices from the RFOs in our sample in the area of monitoring are presented below:

Quantitative indicators:

One of the RFOs in our sample that uses a rather comprehensive set of indicators is the **AEI**. This funding agency has chosen the following set of quantitative indicators, as stated in its GEP:

- Number of calls for proposals incorporating the guidelines on the on the gender dimension of R&I and other materials for applicants;
- Percentage of applications aiming to integrate the gender dimension in their projects and specifying how it will be taken into account;
- Number of persons who undergo self-training before participating as experts.

VINNOVA uses as a quantitative indicator the following:

- The number of granted applications that integrate sex and/or gender dimensions in their project within each programme and call.



The listed indicators address especially the activities on the part of RFOs and more initial stages of the funding cycle²⁹ (i.e. the results and impact of the funded projects are paid less attention to). Some of these indicators identified in our sample are already established in part. For example, the share of funded projects that integrate the sex/gender dimension has also been used as an indicator by the European Commission in its publication *She Figures* (EC 2021). Besides, it has been recommended by *Gendered Innovations 2* to focus on the number and proportion of proposals for which sex and/or gender analysis receives the highest number of evaluation points, as these proposals are more likely to result in scientific, social or economic impact (EC 2020: 40). Some other recommendations for indicators related to the gender dimension related to projects' impacts are to monitor the number and proportion of project-related peer-reviewed publications that include a gender dimension or the number and proportion of innovations that can be classified as gender-sensitive (EC 2020: 40).³⁰ This has been reflected in *She Figures 2021*, where the focus is on bibliometric data related to the publication outputs from financed projects. An exploratory analysis on considering intersectionality was performed as well (EC 2021).

Qualitative monitoring:

In this case, RFOs monitor the following areas:

- Quality of applicants' assessment of the relevance of the gender dimension in their projects: In **TACR**'s two pilot calls, gender experts went through all proposals and took notes about the most common issues related to the understanding of the topic of the gender dimension in R&I and integration of this perspective in their research. In **VINNOVA**, the quality of applicants' answers concerning the relevance of sex and/or gender analysis in their proposals is also screened qualitatively, with a focus on possibly specific challenges experienced by applicants from different thematic areas. The **AEI** foresees analysing submitted proposals in the framework of its first GEP.
- **VINNOVA** plans to develop systematics for qualitative follow-up of sex/gender dimensions within funded projects.
- Quality of evaluators' work: at **TACR**, gender experts assisted in the evaluation panels of two pilot calls and observed the most common issues related to the assessment of sex/gender dimensions in proposals on the part of evaluators.

Technical structures for monitoring:

An obvious prerequisite for monitoring is the existence of technical structures for data collection and analysis. It is very important for RFOs not only to include the requirement to reflect sex/gender dimensions in the application form but also to ask researchers during the implementation of their projects and at their end for a description of the real activities performed to ensure sex/gender dimensions are

²⁹ Similar indicators that have been suggested by some include the number of applicants, team members, evaluators or staff who engaged in relevant training (see *GENDER-NET Plus 2021*, Hunt, Nielsen, Schiebinger 2022).

³⁰ Similarly, Hunt, Nielsen and Schiebinger (2022) formulate as one of the possible indicators the number and proportion of publications or other recognized modes of dissemination from funded projects.



considered in projects and their outputs. The recommendation that project reporting templates should reflect the proposal submission templates by requiring reporting on integrating the gender dimension into the projects' content was also formulated as a recommendation for Horizon Europe's policy as part of Gendered Innovations 2. It was accompanied by a corresponding recommendation that reviewers carrying out mid-term and final evaluations should focus on implementing the plans in proposals (EC 2020: 40). As the results of our benchmarking study show, this systemic approach is already in place in some RFOs surveyed:

- Both the **AEI** and **VINNOVA** include in their reporting templates for R&I teams during the implementation of projects and at their end a direct requirement of a summary of the integration of gender analysis in projects (the AEI asks in detail about different aspects: objectives, methodology, results, application and impacts). These aspects are then considered by external experts in their assessment of the implementation of funded projects.
- A similar practice is performed in **IRC**. IRC was one of the first RFOs to require applicants to consider the sex and gender dimensions of their research when submitting proposals. Even though this aspect of proposals is not scored, in some funding schemes, the actual integration of gender analysis in funded projects (whether the activities correspond with those suggested in proposals) is reviewed as part of the evaluation done during the mid-point reporting.
- **VINNOVA** uses a technical tool for data analysis and visualisation, which enables it to monitor its data (especially the number of applications integrating sex/gender dimensions within each programme and call) continuously.

PROMISING PRACTICES RELATED TO EVALUATION OF THE IMPLEMENTATION OF POLICIES

In opposition to monitoring, where the focus is primarily on the fulfilment of individual steps, which are supposed to reflect different aspects of the state of implementation of a certain policy, evaluation is a systematic assessment of a policy (its design, implementation and results) aiming to determine the relevance and fulfilment of the objectives, effectiveness, impact and sustainability. It ideally builds on monitoring data, and it should be able to formulate the lessons learned based on credibly based findings to inform further decisions related to its object (Wroblewski, Eckstein 2018: 3).

The information about evaluating the implementation of policies promoting the integration of sex/gender dimensions in R&I that we received from RFOs in our sample is limited. The most promising practices have been identified in **IRC**, **FORTE** and **VINNOVA**.

- In 2020, the **IRC** commissioned an external evaluation of the progress made under its Gender Strategy, which also included the evaluation of several aspects related to the integration of the sex/gender dimension in research. It focused, for example, on researchers' understanding of the sex/gender dimension and its considerations in research in different subject areas, as well as participation in training on the sex/gender dimension. Based on this evaluation, several recommendations were formulated (for more details, please see Ortus Economic Research and Loughborough University, 2020).
- **FORTE** and **VINNOVA** also focused on researchers' understanding of the sex/gender dimension in research content (as a concept) and existing challenges in this area. Both of these



RFOs examined the impact of the measures they introduced on supported projects and reported an increase in the proportion of those considering the sex/gender dimension.

6. CONCLUSIONS AND RECOMMENDATIONS

6.1. National authorities

The analysis of the survey responses from the 15 national authorities (both ministries and supporting organisations) shows that several respondents are unsure about what the gender dimension in the content of R&I entails and mix it up with gender balance in research teams. Several national authorities answered that they have specific policies at the national level for integrating the gender dimension (including sex/gender analysis) in the content of R&I and subsequently referred to general gender equality policies.

The content analysis of the survey responses by the national authorities reveals that only a minority of 3 national authorities or 20 percent of the sample (Czech Republic, Spain and Sweden) have specific policies or strategies in place for integrating sex/gender analysis into R&I content. Some countries (Austria, Lithuania and Portugal) are planning to make policies or strategies as part of their endorsement of ERA policies. The few national authorities that have such policies direct them mainly towards public research funding agencies. However, in the case of Spain, a recent modification of the Law on STI, urge *all* public agents of the Spanish R&I system to promote the implementation of measures to achieve the integration of the gender dimension in the content of R&I. This amendment is so new that it has not yet been implemented. A general finding is that implementation, monitoring and evaluation of policies on the integration of the gender dimension in R&I content is not performed by national authorities but allocated to RFOs.

Around 50 percent of the national authorities answer that they have an action in place that requires applicant to specify whether they are considering sex and/or gender analysis in their research or innovation proposal. However, the analysis of the survey responses indicates that the relatively high percentage is the result of different understandings of the question, which was formulated as "*What kind of actions have been taken by your national authority at national level to promote the integration of the gender dimension into R&I?*". It is likely that many of the respondents referred to actions taken by RFOs and not by the national authority. Hence, if the question had been formulated even more clearly, we would probably have got more answers similar to the one from the Norwegian Ministry of Research and Education, which replied that such tasks are delegated to the Research Council of Norway.

In Sweden, there are governmental instructions to RFOs stating their responsibility to integrate the gender dimension in research content in their funding schemes. This is part of the government's long-term gender mainstreaming strategy. However, from the Swedish point of view, it is important that the government does not put political pressure on how the RFOs shall implement this overarching strategy but let them and RPOs develop their own measures and activities to ensure the implementation of gender equality measures relevant for enhancing the quality of research, innovation and education. Still, the Swedish national authority suggests that the government could systematically ask the RFOs for



evaluation and monitoring of the implementation of their policies. Another suggestion is to set up a monitoring device on a national level.

RECOMMENDATIONS

Given the fact that the uncertainty of what the gender dimension in R&I content prevails, it is recommended that systematic trainings be offered to national authorities about sex/gender analysis in the content of R&I. The trainings should also address intersectional perspectives.

Advance on coordination mechanisms to ensure that all the funding agencies (national and regional) integrate a national policy/directive to ensure the sex/gender analysis in funded research

The recent Spanish Law on STI that urges all public agents of the R&I system to promote the implementation of measures to achieve the integration of the gender dimension in the content of R&I is worth close monitoring in order to gain an overview of whether the measure is working as intended.

The Swedish model of governmental instructions to RFOs to integrate the gender dimension in research content in their funding schemes is a promising measure insofar as it focuses on the need to improve the quality of research and innovation. However, governments should systematically monitor and evaluate the implementation of the RFO policies on including the gender dimension in R&I content.



6.2. Research Funding Organisations

The analysis of funding agencies involved in this benchmark has led to several conclusions and their related recommendations.

CONCLUSIONS

Sister projects have a history of data collection regarding policies for the integration of the gender dimension in R&I since the 7th Framework Programme. This knowledge is valuable and deserves to continue for a better understanding of the evolution of gender equality in R&I in the ERA.

Horizon Europe objectives and requirements regarding gender equality have certainly been a trendsetter with an impact on RFOs' activities. However, while the message from the EC related to gender equality plans has permeated R&I organisations and raised visibility of this instrument, the particular objective and domain represented by the gender dimension in R&I has been relegated to a second, less visible, position in many RFOs. Since the gender dimension in R&I has been listed as one aspect to consider by the organisation, along with recruitment, salaries, work-life balance, etc., the fact that gender dimension in R&I relates to the content of knowledge/research has not been sufficiently evident.

The confusion about the gender dimension in R&I versus gender equality/balance measures is a classic in the field and a well-known obstacle faced by gender experts and practitioners in RFOs. This report only confirms that the confusion continues to persist, especially among newcomers in gender equality policies.

RECOMMENDATIONS

The activity of mapping policies to inform the policy level and facilitate mutual learning among R&I institutions need to be ensured through actions of policy coordination under Horizon Europe funding.

Random checks by the EC on the eligibility criterion should pay attention to the relevance of sex/gender analysis initiatives in RPOs and RFOs

Recommendations to have specific policies, even if part of general GEPs, for the gender dimension in R&I field is crucial to avoid confusion/overlooking of the content of research and innovation. GENDERACTIONplus project, championed by its RFO Community of Practice, can have a relevant role in spreading the word among RFOs.

Clear guidelines and definitions of sex/gender analysis versus gender equality/balance measures targeting both researchers and evaluators need to be adopted by all the RFOs in their gender equality policies. The concepts should follow the EC approach to this field of gender & science.



CONCLUSIONS

Funding agencies generally claim to carry out many more initiatives on the integration of sex/gender analysis than those found in their policy documents/websites.

There is a confusing framing of the problem in the RFOs discourse: while some of them link sex/gender analysis to “excellence”, others “apologise” for introducing gender equality policies that may interfere with “excellence” and “objectivity”.

Obstacles faced by RFOs when promoting specific gender dimension in R&I policies have remained almost unchanged since 2015. There is still some resistance from different R&I actors, such as the hierarchy of the institutions, researchers and evaluators.

While several evaluations of these policies have revealed positive changes in terms of quantity, quality and aim of the sex/gender analysis in research proposals, professional evaluation is still scarce among RFOs and this leads to an impossibility to assess impact.

There are few examples and tentative attempts by RFOs to integrate an intersectional perspective in their initiatives to promote sex/gender analysis in R&I content. There is a risk of misunderstanding – i.e. narrowing intersectionality in R&I content down to increasing diversity in human resources policies - and also a risk of simplification around intersectionality among RFOs.

RECOMMENDATIONS

RFOs need to make an effort to document clearly all the measures and processes regarding sex/gender analysis in order to inform mappings of public policies properly.

RFOs have an important role to play in order to have a clear and consistent discourse regarding the gender dimension in R&I as part of quality and absence of bias in R&I content in the ERA. A communication effort is needed in the RFOs gender equality policies.

Develop specific capacity-building activities on how to address resistances to the gender dimension in R&I in the framework of the GENDERACTIONplus Community of Practice.

Strengthen cooperation with the EC and mutual learning among RFOs towards a culture of policy evaluation, also with regard to the gender dimension in R&I. Planning for monitoring and evaluation should be explicitly foreseen from the design stage of these policies.

Develop clear guidelines for RFOs on how to address the design of human resources policies with a focus on diversity and the difference from integrating gender analysis in R&I from an intersectional perspective. Mutual learning activities in the topic could broaden their scope beyond the ERA and include third countries with a vast experience in diversity/intersectional policies such as Canada and the US.



GENDER ACTION+

The EC, in the framework of Horizon Europe, has asked RFOs to consider how sex and gender analysis will be included in the research outputs of an organisation and to set out the organisation's commitment to incorporating sex and gender in its research priorities, along with the processes for ensuring that the gender dimension is considered in research. Indeed, one of the objectives of the ERA Policy Agenda Action 5 "Promote gender equality and foster inclusiveness, taking note of the Ljubljana Declaration" is to develop principles for the integration and evaluation of the gender perspective in R&I content in cooperation with national RFOs. This benchmark analysis has shown that the gender dimension in R&I – when properly understood - is hardly considered among the RFOs priorities, that the correspondent processes within RFOs are not consistent enough, and thus a proper evaluation of sex/gender analysis lacks the necessary structures. The GENDERACTIONplus project, championed by its RFO Community of Practice, can be an ally of the ERA Forum Subgroup "Inclusive Gender Equality in the ERA" in this endeavour of effectively engaging with national RFOs, as well as with the Horizon Europe Framework Programme to succeed in a better integration of the gender dimension in R&I proposals through the future work to increase capacity-building among HE National Contact Points.

Action 5 "Promote gender Equality and Foster inclusiveness"

1. Develop a policy coordination mechanism to support all aspects of gender equality through inclusive GEPs and policies[...];
 2. Strategy to counteract gender-based violence including sexual harassment in the European R&I system [...];
 3. A policy approach to strengthen gender equality, that addresses gender mainstreaming to advance the new ERA;
 4. Develop principles for the integration and evaluation of the gender perspective in R&I content in cooperation with national RFOs.
- Source: Council of the EU 2021

Subgroup
to the ERA
Forum

7. ACKNOWLEDGEMENTS

35 partners and associated institutions involved in the GENDERACTIONplus Communities of Practice have kindly contributed to provide relevant information on the status of gender equality policies in their respective countries/organisations. The WP4 team is very grateful to them. The team is particularly grateful to those national authorities and RFOs that took the time to clarify their specific policies on the gender dimension in R&I during the consultation phase conducted in February 2023 since this has improved the accuracy of the report. Finally, the analysts involved in the benchmark reports of other WPs and participated in benchmark workshops of the GENDERACTIONplus consortium have helped the team to clarify and make decisions in different steps of the process. Emer Cahill from the Irish Research Council also provided valuable advice in her review of Deliverable 4.1.



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

Views and opinions expressed here are those of the author(s) only and do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them.

8. REFERENCES

Bacchi, C. (2012). Introducing the ‘What’s the Problem Represented to be?’ approach. In A. Bletsas & C. Beasley (Eds.), *Engaging with Carol Bacchi: Strategic Interventions and Exchanges*. Adelaide: The University of Adelaide Press: 21–24. doi:10.1017/UPO9780987171856.003.

Bozzon, R., A. Murgia, B. Poggio (2019). “Gender and precarious careers in academia and research: macro, meso and micro perspectives.” In A. Murgia, B. Poggio (Eds.). *Gender and Precarious Research Careers*. London, New York: Routledge: 15–49.

Council of the EU (2021). [Council Conclusions on the Future Governance of the ERA](#).

Crenshaw, K. (1989). “Demarginalizing the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics,” *University of Chicago Legal Forum*, 1989, 1 (1989): 139–167.

EIGE (2013). *Mainstreaming Gender into the Policies and the Programmes of the European Union and EU Member States: Good Practices in Gender Mainstreaming*. Luxembourg: Publications Office of the European Union.

EIGE (2022). *Gender Equality in Academia and Research. GEAR tool step-by-step guide*. Luxembourg: Publications Office of the European Union.

ERAC Standing Working Group on Gender in Research and Innovation. (2019). *Innovating innovation: Policy brief on gender and innovation (ERAC 1210/19)* Brussels, 20 June 2019.

<https://data.consilium.europa.eu/doc/document/ST-1210-2019-INIT/en/pdf>

European Commission, Directorate-General for Research and Innovation (2020). *Gendered innovations 2: how inclusive analysis contributes to research and innovation: policy review*, Publications Office. <https://data.europa.eu/doi/10.2777/316197>

European Commission (2021). [Horizon Europe Guidance on Gender Equality Plans](#).

European Commission (2021). [She Figures 2021: Gender in Research and Innovation: Statistics and Indicators](#).

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

Fazal N., Jackson S. F., Wong, K., Yessis J. & N. Jetha (2017). *Between Worst and Best: Developing Criteria to Identify Promising Practices in Health Promotion and Disease Prevention for the Canadian Best Practices Portal*. *Health Promot Chronic Dis Prev Can* 37(11): 386-392.

GENDER-NET Plus (2021). *Comparative analytical report on existing national and regional initiatives on the integration of the gender dimension in research content*. GENDER-NET Plus Deliverable 6.2. ERA-NET Cofund Promoting Gender Equality in H2020 and the ERA – GENDER NET Plus.

Hunt, L., M. W. Nielsen & L. Schiebinger (2022). *A framework for sex, gender, and diversity analysis in research*. *Science* vol. 377, no. 6614: 1492-1495.

Puy Rodríguez, A. & M. P. Pérez (2016). *Comparative Analysis of Existing National Initiatives on the Integration of the Gender Dimension in Research Contents*. *Gender-Net*.



Schiebinger, L., I. Klinge, A. Arlow & S. Newman (2010). Gendered Innovations: Mainstreaming Sex and Gender Analysis into Basic and Applied Research: Meta-Analysis of Gender and Science Research - Topic Report. Brussels: European Commission.

Van den Brink, M., Y. Benschop (2011). "Gender Practices in the Construction of Academic Excellence: Sheep with Five Legs." *Organisation* 19(4): 507–524.

Wroblewski, A. & K. Eckstein (2018). TARGET D4.1 Gender Equality Monitoring Tool and Guidelines for Self-assessment. http://www.gendertarget.eu/wp-content/uploads/2018/12/741672_TARGET_Monitoring_Tool_D4.pdf

Young Håkansson, S. & J. Sand (2021). The Gender Dimension in Research and Innovation: Results from a global survey on research funding organisations. Gothenburg: Swedish Secretariat for Gender Research, University of Gothenburg.

ANALYSED DOCUMENTS

NATIONAL AUTHORITIES

Académie de recherche et d'enseignement supérieur (ARES) [2021]. Commission Genre en Enseignement Supérieur (CoGES). In French only: <https://www.ares-ac.be/fr/a-propos/instances/commissions-permanentes/genre-coges>

Bundesministerium für Bildung, Wissenschaft und Forschung (2019). Der Gesamtösterreichische Universitätsentwicklungsplan 2022–2027. In German only: https://www.bmbwf.gv.at/dam/jcr:b7701597-4219-42f3-9499-264dec94506e/GUEP%202022-2027_Aktualisiert_um_Statistik_final_bf.pdf

Bundesministerium für Bildung, Wissenschaft und Forschung (2022). Der Gesamtösterreichische Universitätsentwicklungsplan 2025–2030. In German only: https://pubshop.bmbwf.gv.at/index.php?rex_media_type=pubshop_download&rex_media_file=unientwicklungsplan_25_30_1.pdf

Comité femmes et science (2022). Avis sur la présence des femmes dans la recherche. In French only: https://www.femmes-sciences.be/system/files/Pre%CC%87sence%20des%20femmes%20dans%20la%20recherche_avis_0.pdf

Comité Femmes et Sciences (2022). Prix de la recherche du Comité femmes et sciences. In French only: <https://www.femmes-sciences.be/prix-de-la-recherche-2022-genre-et-environnement>

Federal Ministry of Education, Science and Research (2017). Austrian National Development Plan for Public Universities 2019–2024. English version: https://www.bmbwf.gv.at/dam/jcr:dd33ff38-f6c4-406f-84be-ed2a64db4d6d/GUEP_2019-2024-EN_Version_2017.pdf

Fédération Wallonie-Bruxelles (2020). Plan Droit des femmes 2020–2024. In French only: http://www.egalite.cfwb.be/index.php?eID=tx_nawsecuredl&u=0&g=0&hash=fba5f84be288ad0d20ffc7c6da00b8b6df5d46fa&file=fileadmin/sites/sdec_III/upload/sdec_III_super_editor/sdec_III_editor/documents/Droits_des_Femmes/Plan_Droits_des_Femmes_2020-2024_FWB.pdf



Fédération Wallonie-Bruxelles (2020). Plan intra-françophone de lutte contre les violences faites aux femmes. In French only:
http://www.egalite.cfwb.be/index.php?eID=tx_nawsecuredl&u=0&g=0&hash=d8b3da0904b5dcdae4bcd11756362e9874c77921&file=fileadmin/sites/sdec_III/upload/sdec_III_super_editor/sdec_III_editor/documents/Violence/VF_Plan_intrafrancophone_violences_2020-2024_01.pdf

Fédération Wallonie-Bruxelles (2022). Appel à projets FRHE–Financement de la recherche en Hautes Écoles. In French only:
https://www.recherchescientifique.be/index.php?eID=tx_nawsecuredl&u=0&g=0&hash=82833fe0f1afb119ca1741f01cf11c5f48ebe126&file=fileadmin/sites/sirs/upload/sirs_super_editor/sirs_editor/documents/FRHE/FRHE-Appel_2022-2023-15.03-Valide_par_GOV.pdf

Fédération Wallonie-Bruxelles. Centre de documentation administrative D. 07-02-2019. Décret définissant la formation initiale des enseignants. In French only:
https://www.gallilex.cfwb.be/document/pdf/46261_009.pdf

Gobierno de España (2022). Ley 17/2022, de 5 de septiembre, por la que se modifica la Ley 14/2011, de 1 de junio, de la Ciencia, la Tecnología y la Innovación. In Spanish only: [BOE-A-2022-14581 Ley 17/2022, de 5 de septiembre, por la que se modifica la Ley 14/2011, de 1 de junio, de la Ciencia, la Tecnología y la Innovación.](https://www.boe.es/boe/A-2022-14581.html)

Office of the Government of the Czech Republic (2019). Gender Equality Strategy for 2021 – 2030. English version: <https://www.vlada.cz/assets/ppov/gcfe/Gender-Equality-Strategy-2021-2030.pdf>

Technologická agentura ČR (2022). Plán genderové rovnosti TA ČR 2022–2025. In Czech only: https://www.tacr.cz/wp-content/uploads/documents/2022/09/08/1662643903_GEP_FINAL.pdf

Utbildningsdepartementet (2023). Förordning (2009:975) med instruktion för Vetenskapsrådet. In Swedish only: [Förordning \(2009:975\) med instruktion för Vetenskapsrådet Svensk författningssamling 2009:2009:975 t.o.m. SFS 2023:8 - Riksdagen](https://www.sfs.se/2009:975)

RESEARCH FUNDING ORGANISATIONS

AEI (2021). I Gender Equality Plan 2021-2023 of the Agencia Estatal de Investigación.

FRRB (2021). Gender Equality Plan.

FWO (2022). FWO Gender Equality Plan.

IRC (2019). Gender Strategy & Actions.

NCBR (2022). Men and Women Equality Plan for the National Center for Research and Development.

NCN (2022). Gender Equality Plan for the National Science Centre 2022- 2025.

Ortus Economic Research Ltd. (2020): <https://research.ie/assets/uploads/2022/03/IRCGenderPlans.pdf>

RCN (2019). Policy for gender balance and gender perspectives in research and innovation.

RIF (2018). Research Promotion Foundation Gender Equality Plan 2018-2020.



TACR (2022). Gender Equality Plan 2022 – 2025.

TUBITAK (2022). Gender Equality Plan for the Scientific and Technological Research Council of Turkey 2022-2025.

VINNOVA (2022). Vinnovas gender mainstreaming plan 2022 – 2025.



9. ANNEX I COUNTRY SHEETS

AUSTRIA

Ministry of Education, Science and Research

Type of organisation	National ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	No
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Inclusion of gender experts in the research teams is encouraged in the R&I calls <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees		
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	Yes		
National authority has policy for promoting sex/gender analysis in university-level curricula	Yes		
Links and relevant passages	<p>Austrian National Development Plan for Public Universities 2019–2024: available in English: https://www.bmbwf.gv.at/dam/jcr:dd33ff38-f6c4-406f-84be-ed2a64db4d6d/GUEP_2019-2024-EN_Version_2017.pdf (relevant passages from P. 34)</p> <p>Austrian National Development Plan for Public Universities 2022-2027; System Goal 7a) Gender Equality https://www.bmbwf.gv.at/dam/jcr:b7701597-4219-42f3-9499-264dec94506e/GUEP%202022-2027_Aktualisiert_um_Statistik_final_bf.pdf (from p. 27)</p> <p>Austrian National Development Plan for Public Universities 2025-2030 System Goal 4c) Gender Equality and Inclusion</p>		



https://pubshop.bmbwf.gv.at/index.php?rex_media_type=pubshop_download&rex_media_file=unientwicklungsplan_25_30_1.pdf (from p. 32)



BELGIUM-FLANDERS

Department of Economy, Science & Innovation

Type of organisation	Regional ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Other: national		
National authority has policy for integrating gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		

Research Foundation - Flanders (FWO)

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences



		<input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research		
RFO has gender equality policy	Yes (since 2021)			
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available			
RFO has policy for integrating gender dimension into R&I content	Yes			
Type of policy on gender dimension in R&I	Specific strategy/ policy/ measure (e.g. gender equality plan)			
Context of RFO policy on gender dimension in R&I	The policy is part of their GEP (see link before) and is currently being implemented in the application forms of all their funding schemes.			
Goals of policy on gender dimension in R&I	The FWO funds excellent and promising researchers as well as research projects. The selection follows the bottom-up principle and is conducted on an inter-university basis with excellence as the sole selection criterion, regardless of scientific discipline, host institution, gender, ethnicity, religion or political belief of the applicant. This implies that FWO funded research should be relevant, to the maximum possible extent, for all sexes and genders. To this end, applicants need to indicate how they take the issues of gender and diversity into account while designing their research plan (e.g. selection of human participants and/or animals in experiments, relevance of research questions and/or results with respect to gender differences, etc.). This information is taken into account during the evaluation of funding applications.			
	Intersectional approach in policy	No	Innovation and private sector included	No
Link(s) to RFO policy on gender dimension in R&I (Q7.3a)	https://www.fwo.be/en/the-fwo/research-policy/hr-strategy/equal-opportunity-policy/ https://www.fwo.be/media/1024637/application-form-for-a-junior_senior-research-project-fundamental-research-2022.pdf			



BELGIUM-WALLONIA

Ministry of the Wallonia-Brussels Federation

Type of organisation	Regional ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	Yes
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Other: see links below		
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	No		
Name of national policy on gender dimension in R&I and/or relevant link(s)	<p>Not policy, but other relevant documents:</p> <p>Action 3.7.3 of the Plan Droit des femmes focus on gender dimension into R&I :</p> <p>http://www.egalite.cfwb.be/index.php?eID=tx_nawsecuredl&u=0&g=0&hash=fba5f84be288ad0d20ffc7c6da00b8b6df5d46fa&file=fileadmin/sites/sdec_III/upload/sdec_III_super_editor/sdec_III_editor/documents/Droits_des_Femmes/Plan_Droits_des_Femmes_2020-2024_FWB.pdf</p> <p>The Women and Science Committee yearly awards prizes for research integrating a gender dimension. See : https://www.femmes-sciences.be/prix-de-la-recherche-2022-genre-et-environnement https://www.femmes-sciences.be/prix-cfs-du-master-de-specialisation-en-etudes-de-genre</p> <p>The Financement de la recherche en Hautes Ecoles (research funding scheme for university colleges) pays special attention to the gender dimension into the R&I content of the applications : https://www.recherchescientifique.be/index.php?eID=tx_nawsecuredl&u=0&g=0&hash=82833fe0f1afb119ca1741f01cf11c5f48ebe126&file=fileadmin/sites/sirs/upload/sirs_super_editor/sirs_editor/documents/FRHE/FRHE-Appel_2022-2023-15.03-Valide_par_GOV.pdf</p> <p>The Comité femmes et science position paper on “Présence des femmes dans la recherche” recommends to the RFO and the universities to</p>		



	<p>“Systematically question the variables gender (socio-cultural construction) and sex (biological) in the content of the research in the calls for projects with the integration, where appropriate, of an intersectional perspective” (https://www.femmes-sciences.be/system/files/Pre%CC%87sence%20des%20femmes%20dans%20la%20recherche_avis_0.pdf)</p> <p>Among the missions of the Commission Genre en Enseignement Supérieur, there stands “ to promote the integration of the gender dimension in all curricula, training, content and research in higher education ; See : https://www.ares-ac.be/fr/a-propos/instances/commissions-permanentes/genre-coges</p>
<p>National authority has policy for promoting sex/gender analysis in university-level curricula</p>	<p>Yes</p>
<p>Links and relevant passages</p>	<p>See action 1.9 of the Women’s Rights Plan</p> <p>See also action 34 of the Intra-Frenchspeaking Plan to combat violence against women (http://www.egalite.cfwb.be/index.php?eID=tx_nawsecuredl&u=0&g=0&has h=d8b3da0904b5dcd4e4bcd11756362e9874c77921&file=fileadmin/sites/s dec_III/upload/sdec_III_super_editor/sdec_III_editor/documents/Violence/V F_Plan_intrafrancophone_violences_2020-2024_01.pdf)</p> <p>The decree of 7 February 2019 (https://www.gallilex.cfwb.be/document/pdf/46261_009.pdf , modified on 2 December 2021), provides for gender mainstreaming in the initial training of teachers. And more particularly in training to and through practice, didactic and pedagogical training and training in human and social sciences (article 19 and article 30 §2). The gender dimension has been explicitly specified in the revision of initial teacher training, see article 2, 17°, article 5, art. 19, art. 24, art. 30, art. 51</p>



Fund for Scientific Research (FNRS)

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Strategic research	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2022)	
RFO has policy for integrating gender dimension into R&I content	No	



BULGARIA

Bulgarian National Science Fund

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences
RFO has gender equality policy	No	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis	
RFO has policy for integrating gender dimension into R&I content	No	



CROATIA

Ministry of Science and Education (MZO)

Type of organisation	National ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	Yes
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available		
National authority has policy for integrating gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	Yes		
Links and relevant passages	Education module for the promotion of gender equality		



CYPRUS

Research and Innovation Foundation

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2018)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available	
RFO has policy for integrating gender dimension into R&I content	Yes	
Type of policy on gender dimension in R&I	Specific strategy/ policy/ measure (e.g. gender equality plan)	
Context of RFO policy on gender dimension in R&I	The policy is part of the Research and Innovation Foundation's GEP and it is incorporated in the Call for Proposals and other related documents.	
Goals of policy on gender dimension in R&I	Gender equality (a) within the organisation (HR policy, Decision Making, Transversal Measures) and (b) as a Funding Organisation (in the design of Calls and content of R&I projects).	



	Intersectional approach in policy	No	Innovation and private sector included	Yes
	Link(s) to RFO policy on gender dimension in R&I	https://www.research.org.cy/en/strategic-planning/gender-equality/		



CZECH REPUBLIC

Institute of Sociology of the Academy of Sciences of the Czech Republic

Type of organisation	Public research institute		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	No	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	Other: Through the funding of the Centre for Gender & Science (ISAS) Ministry of Education, Youth and Sports supports activities such as the web portal One Size Does Not Fit All (https://genderaveda.cz/en/one-size-doesnt-fit-all/) that focus on the popularisation of the gender dimension in research. Also, open access e-learning module is being prepared, including gender dimension and workshops and ad hoc onsite lectures in RPOs take place. On 24 October, a workshop of the Working Group for Gender Equality (under the Council for Research, Development and Innovation, Office of the Government) took place. It addressed representatives of RFOs and discussed gender dimension in funding programs.		
National authority has policy for integrating gender dimension in R&I	Yes		
Type of policy on gender dimension in R&I	There are two tasks addressing this in Gender Equality Strategy (link below)		
Goals of policy on gender dimension in R&I	<p>See the tasks in Gender Equality Strategy:</p> <p>2.4.1 Taking into account the dimension of sex and gender in the content of research, development and innovation as part of support for RDI projects</p> <p>2.4.2 Implementing the dimension of sex and gender in the content of research and innovations as a criterion of evaluation of research and university institutions for the purposes of institutional funding</p>		



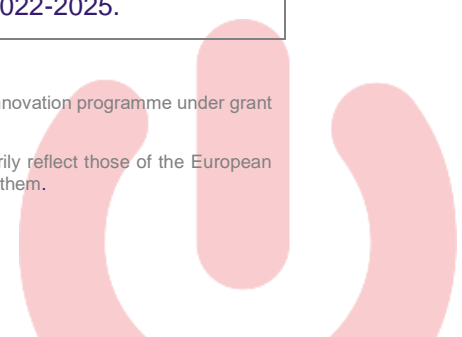
Intersectional approach in policy	No	Innovation and private sector included	No
Name of national policy on gender dimension in R&I and/or relevant link(s)	Gender Equality Strategy (2021 – 2030): https://www.vlada.cz/assets/ppov/gcfge/Gender-Equality-Strategy-2021-2030.pdf , Annex 1, p. 58-61. Measures under Strategic Objective 2 Expanding the content of education, science and research to include a gender perspective.		
National authority has policy for promoting sex/gender analysis in university-level curricula	Yes		
Links and relevant passages	Task 2.3.1 in Gender Equality Strategy: Supporting the introduction of a gender dimension into teaching at faculties training teachers and other faculties in the Czech Republic, Annex 1, p. 60. https://www.vlada.cz/assets/ppov/gcfge/Gender-Equality-Strategy-2021-2030.pdf .		

Technology Agency of the Czech Republic (TACR)

Type of organisation	Research Funding Agency		
Research areas funded	<input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research	
RFO has gender equality policy	Yes (since 2016)		
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Inclusion of gender experts in the research and innovation teams is encouraged in the R&I calls		



	<ul style="list-style-type: none"> <input type="checkbox"/> Training on sex/gender analysis for the research and innovation team is considered as an eligible cost in the RFO funding schemes <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available <p>* some of the measures were limited to selected calls for proposals</p>
RFO has policy for integrating gender dimension into R&I content	<p style="text-align: center;">Yes</p>
Type of policy on gender dimension in R&I	<p>Specific strategy/ policy/ measure (e.g. gender equality plan)</p>
Context of RFO policy on gender dimension in R&I	<p>The relevant policy is TACR's Gender Equality Plan 2022-2025 [English version not yet available]</p>
Goals of policy on gender dimension in R&I	<p>The main aims concerning the integration of the gender dimension in research are defined as follows:</p> <ol style="list-style-type: none"> 1. Revise individual aspects of the already implemented evaluation criterion focused on the gender dimension in research content based on the experience from calls in which it was implemented in the TACR in the past (formulation of the criterion and instructions, information in the general guides for applicants and evaluators, the specific guideline for integrating the gender dimension in research content, etc.). Based on this, a general methodology for integrating the requirement of considering the gender dimension in any call of TACR should be created (which should make the transfer of the criterion to different calls easier). In addition, an updated specific guideline on the topic of the integration of the gender dimension in research for applicants and evaluators should be created (which has already been done). 2. Implement the revised criterion focusing on gender in research content in selected further calls in the period 2022-2025.



	<p>3. Ensure understanding of the meaning of the criterion aimed at promoting the integration of gender dimension in research content (including an understanding of the mechanism for its evaluation) among staff communicating with applicants and those involved in the evaluation process (= training for the given target group).</p> <p>As written in the GEP, additional objectives for this area may be included in the future (e.g. to introduce monitoring of the proportion of funded projects planning to integrate the gender dimension and monitoring of the actual state in funded projects).</p>			
	Intersectional approach in policy	Yes	Innovation and private sector included	Yes
Link(s) to RFO policy on gender dimension in R&I	https://www.tacr.cz/wp-content/uploads/documents/2022/09/08/1662643903_GEP_FINAL.pdf (Czech version)			



DENMARK

University of Southern Denmark, SDU

Type of organisation	Public university		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	No	National policy for higher education and/or R&I includes gender equality	No
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		

Independent Research Fund Denmark (DFF)

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2017)	



RFO has policy for integrating gender dimension into R&I content	No
--	----

ESTONIA

Estonian Research Council

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2020)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Supportive tools, active participation in international networks	
RFO has policy for integrating gender dimension into R&I content	No	



GREECE

National Documentation Centre

Type of organisation	Public-interest legal entity under private law		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	<ul style="list-style-type: none"> <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis <input type="checkbox"/> Actions to promote sex/gender analysis in university-level curricula 		
National authority has policy for integrating gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		



IRELAND

Higher Education Authority

Type of organisation	Statutory (government) body		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	No	National policy for higher education and/or R&I includes gender equality	Yes
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal		
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		

Irish Research Council

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences



		<input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research		
RFO has gender equality policy	Yes (since 2013)			
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> A specific funding programme on gender studies is in place <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Training on sex/gender analysis for the research and innovation team is considered as an eligible cost in the RFO funding schemes <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available			
RFO has policy for integrating gender dimension into R&I content	Yes			
Type of policy on gender dimension in R&I	Specific strategy/ policy/ measure (e.g. gender equality plan)			
Goals of policy on gender dimension in R&I	The main goal was to make it mandatory for all applications to the IRC to include consideration of a sex and/or gender dimension to the research and to justify any assertion that no such dimension existed.			
	Intersectional approach in policy	No	Innovation and private sector included	No
Impacts of the policy	In 2020 an external consultant was commissioned to review the IRC's Gender Strategy and as part of this work they reviewed the responses to the sex/gender dimension question over time. A random sample of answers were examined for robustness and response rates, across all disciplines. The results of the analysis showed that answers have improved over time and that subjects where gender is taught at undergraduate level have a greater response rate and understanding than those that have not studied gender previously. Response rates were also highest amongst social sciences and Humanities and lowest in physical sciences and engineering.			
Link(s) to RFO policy on gender dimension in R&I	Irish Research Council Gender Strategy and Actions:			



<https://research.ie/assets/uploads/2018/08/04108-IRC-Gender-flyer-proof03-single.pdf>

<https://research.ie/assets/uploads/2022/03/IRCGenderPlan-s.pdf>



ISRAEL

Ministry of Innovation, Science & Technology

Type of organisation	National ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	No
National law for higher education and/or R&I includes gender equality	No	National policy for higher education and/or R&I includes gender equality	Yes
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		

ITALY

Regional Foundation for Biomedical Research

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies	<input type="checkbox"/> Medical and health sciences
RFO has gender equality policy	Yes (since 2019)	



Actions taken by RFO to promote gender dimension into R&I	<ul style="list-style-type: none"> <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis 		
RFO has policy for integrating gender dimension into R&I content	<p style="text-align: center;">Yes</p>		
Type of policy on gender dimension in R&I	<p>Specific strategy/ policy/ measure (e.g. gender equality plan)</p>		
Context of RFO policy on gender dimension in R&I	<p>Policy included in their GEP: "2.4.5 Including in the call texts a focus on sex and gender in the content of the research"</p>		
Goals of policy on gender dimension in R&I	<p>FRRB stakeholders are hospitals and research organisations, so adopting GE policies in the organisation means, for instance, to make sure that all calls for proposals launched include a focus on sex and gender in the content of the research. In this way, changing the procedures FRRB can impact the way its stakeholders work.</p>		
Intersectional approach in policy	<p>Yes</p>	Innovation and private sector included	<p>No</p>
Impacts of the policy	<p>Gender dimension in R&I is now considered as a fundamental part of the quality of research.</p>		
Link(s) to RFO policy on gender dimension in R&I	<p>https://www.frrb.it/systemFiles/politiche_di_genere/19_pdfsam_gep_en_2021frrb_report_en.pdf</p>		



LITHUANIA

Vilnius University Šiauliai Academy

Type of organisation	Public university		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available		
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	Yes		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		



Research Council Lithuania

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research / blue skies	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2021)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Training on sex/gender analysis for the research and innovation team is considered as an eligible cost in the RFO funding schemes <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available	
RFO has policy for integrating gender dimension into R&I content	No	



MALTA

Malta Council for Science and Technology - MCST

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Social sciences <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2022)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Training on the gender dimension carried out internally for the staff	
RFO has policy for integrating gender dimension into R&I content	No	



NORWAY

Ministry of Education and Research

Type of organisation	National ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	Other: This task has been delegated to the Research Council of Norway		
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		

Research Council of Norway

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences



		<input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research		
RFO has gender equality policy	Yes (since 2019)			
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Inclusion of gender experts in the research and innovation teams is encouraged in the R&I calls <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees			
RFO has policy for integrating gender dimension into R&I content	Yes			
Type of policy on gender dimension in R&I	Specific strategy/ policy/ measure (e.g. gender equality plan)			
Context of RFO policy on gender dimension in R&I	-			
Goals of policy on gender dimension in R&I	<ul style="list-style-type: none"> - participate in international and Nordic cooperation to increase knowledge about the role of the gender dimension in different research areas; - encourage interdisciplinarity in calls for proposals to ensure that gender perspectives are more widely incorporated in projects; - identify areas (such as technology, health, the environment) where there is an especially great need to strengthen the gender dimension in research and innovation content, and implement targeted measures with dedicated initiatives in the field; - conduct field evaluations of Norwegian gender research and assess how portfolio management can help to strengthen research that incorporates gender perspectives; - pave the way for broader involvement of diverse groups in society and user participation in the design of new initiatives. 			
	Intersectional approach in policy	Yes	Innovation and private sector included	Yes
Link(s) to RFO policy on gender dimension in R&I	nfr_gender_policy_orig-1.pdf (forskningsradet.no)			



POLAND

National Information Processing Institute

Type of organisation	National research centre		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	No	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for evaluators		
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	No		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		

National Centre for Research and Development (NCBR)

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences



		<input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2022)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Inclusion of gender experts in the research and innovation teams is encouraged in the R&I calls <input type="checkbox"/> Training on sex/gender analysis for the research and innovation team is considered as an eligible cost in the RFO funding schemes <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available	
RFO has policy for integrating gender dimension into R&I content	Yes	
Type of policy on gender dimension in R&I	RFO internal rules and procedures, including systematic research on gender equality and non-discrimination	
Goals of policy on gender dimension in R&I	<p>In NCBR practice, the topic of gender dimension is associated with gender equality and gender balance issues. Major goals and planned actions regarding the gender dimension in R&I projects are:</p> <ol style="list-style-type: none"> 1. Promotional activities - presentations of projects taking into account the gender dimension in the conducted research (dissemination of good practices). 2. Training on the importance of the gender dimension and gender balance in research addressed to particular groups: experts, beneficiaries and applicants of NCBR calls. 	



	<p>3. E-learning training on the importance of gender dimension in research, addressed to experts.</p> <p>The actions implemented so far by NCBR National Contact Point for Horizon Europe include:</p> <ol style="list-style-type: none"> 1. Online training on: "Principles of gender equality in Horizon Europe" as part of the training project "Manager's Academy 2022" (the gender dimension in R&I projects was in the contents). 2. Online dedicated training for the Polish Geological Institute: "Gender equality for public institutions - starter pack" (the gender dimension in R&I projects was in the contents). 3. Workshop: "The gender dimension in the content of research and innovations - Gender-Based Analysis" during Info Day Horizon Europe 2023. 4. Expert presentation on "The importance of the gender dimension in research and innovations" at the conference "Research Excellence has no gender" in Poznań. 			
	Intersectional approach in policy	Yes	Innovation and private sector included	Yes
Link(s) to RFO policy on gender dimension in R&I	https://www.gov.pl/web/ncbr/kodeks-etyki-ncbr			

National Science Centre

Type of organisation	Research Funding Agency		
Research areas funded	<input type="checkbox"/> Basic research / blue skies	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research	
RFO has gender equality policy	Yes (since 2022)		



<p>Actions taken by RFO to promote gender dimension into R&I</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Inclusion of gender experts in the research and innovation teams is encouraged in the R&I calls <input type="checkbox"/> Training on sex/gender analysis for the research and innovation team is considered as an eligible cost in the RFO funding schemes <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available
<p>RFO has policy for integrating gender dimension into R&I content</p>	<p>Yes</p>
<p>Type of policy on gender dimension in R&I</p>	<p>Specific strategy/ policy/ measure (e.g. gender equality plan)</p>
<p>Goals of policy on gender dimension in R&I</p>	<p>Gender equality in basic research funding</p> <p>Goal 1: Raising awareness of the importance of gender equality in NCN's information and promotion campaigns,</p> <p>Goal 2: Including gender equality aspects in the NCN application forms,</p> <p>Goal 3: Emphasising the importance of gender equality in the documentation and practice of proposal review,</p> <p>Goal 4: Raising awareness of the importance of equality issues and improving gender balance in Expert Teams,</p> <p>Goal 5: Raising awareness of the importance of equality issues in the process of giving out the NCN Award</p>



	Intersectional approach in policy	Yes	Innovation and private sector included	Yes
--	--	-----	---	-----



PORTUGAL

Ministry for Science and Technology and Higher Education

Type of organisation	National ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	No	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> A specific funding programme on gender studies is in place <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Actions to promote sex/gender analysis in university-level curricula		
National authority has policy for integrating gender dimension in R&I	No		
Plan to make policy on gender dimension in R&I	Yes		
National authority has policy for promoting sex/gender analysis in university-level curricula	No		



Foundation for Science and Technology (FCT)

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research / blue skies <input type="checkbox"/> Applied research	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2022)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> A specific funding programme on gender studies is in place	
RFO has policy for integrating gender dimension into R&I content	No	



ROMANIA

Executive Agency for Higher Education, Research, Development and Innovation Funding (UEFISCDI)

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research <input type="checkbox"/> Innovation <input type="checkbox"/> Higher education	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2021)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Dissemination materials on the gender dimension in R&I available	
RFO has policy for integrating gender dimension into R&I content	No	



SPAIN

Ministry of Science and Innovation

Type of organisation	National ministry		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	Yes
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available		
National authority has policy for integrating gender dimension in R&I	Yes		
Type of policy on gender dimension in R&I	There is no policy specifically to integrate de gender dimension in R&I because this policy corresponds to the AEI as the RFO. However, the reform of the Spanish law of STI includes some guidelines on the gender dimension in R&I.		
Goals of policy on gender dimension in R&I	To increase the knowledge on the gender dimension in R&I of all the agents involved in the research funding cycle (researchers, scientific management staff and evaluators), including unconscious bias and gender biases, with the aim of having a positive impact on the integration of a gender perspective in R&I projects.		
Intersectional approach in policy	No	Innovation and private sector included	Yes
Context of national policy on gender dimension in R&I	According to the Law 17/2022 that modifies the Law 14/2011 of Science, Technology and Innovation, the public agents of the Spanish Science, Technology and Innovation System will promote the		



	<p>implementation of measures to achieve the integration of the gender dimension in the content of R&I, which may consist of the following:</p> <p>a) Training, advice and capacity-building mechanisms to guide research personnel, scientific management personnel and evaluation personnel in the integration of the gender dimension in the content of R&D&I projects.</p> <p>b) Incorporation of personnel with expertise in gender equality or external advice to research centres, as well as guidance on equality issues.</p> <p>c) Information and guidance for the identification of unconscious biases, including gender biases.</p>
Name of national policy on gender dimension in R&I and/or relevant link(s)	<p>Law 17/2022 that modifies the Law 14/2011 of Science, Technology and Innovation</p> <p>https://www.boe.es/diario_boe/txt.php?id=BOE-A-2022-14581</p>
National authority has policy for promoting sex/gender analysis in university-level curricula	No

State Research Agency (AEI)

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2022)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> A specific funding programme on gender studies is in place <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I	



	<ul style="list-style-type: none"> <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available <input type="checkbox"/> Gender dimension indicators included in the monitoring procedure of funded projects 		
RFO has policy for integrating gender dimension into R&I content	Yes		
Type of policy on gender dimension in R&I	Specific strategy / policy / measure (e.g. gender equality plan)		
Context of RFO policy on gender dimension in R&I	<p>Although there is no specific strategy for the promotion of the gender dimension in the R&I content, the 1st GEP of the AEI (2021-2023) for its funding includes several objectives and measures focused on sex/gender analysis:</p> <p>Objectives: [...] to promote the integration of a gender dimension in R&D&I projects submitted to AEI calls for proposals;</p> <p>Measure 4.1: Public repository in the AEI's website with support materials on the integration of a gender perspective in the approach, methodology and expected impact of projects (links to different resources, training sessions, videos, etc.).</p> <p>Measure 4.2: Analyses of research project applications that include and describe the gender perspective of the proposed research in the application form.</p> <p>Measure 6.1: Inclusion of descriptors and sections on gender perspective in the evaluation and monitoring report templates.</p> <p>Measure 6.2: Self-training activities to acquire basic knowledge and skills to understand and evaluate gender mainstreaming in research projects.</p>		
Goals of policy on gender dimension in R&I	The main objective related to gender dimension in R&I is: [...] to promote the integration of a gender dimension in R&D&I projects submitted to AEI calls for proposals;		
Intersectional approach in policy	No	Innovation and private sector included	No
Link(s) to RFO policy on gender dimension in R&I	https://www.aei.gob.es/ciencia-igualdad [Spanish only]		



SWEDEN

University of Gothenburg

Type of organisation	Public university		
National anti-discrimination / equal opportunity law	Yes	National anti-discrimination / equal opportunity policy	Yes
National law for higher education and/or R&I includes gender equality	Yes	National policy for higher education and/or R&I includes gender equality	No
Actions taken by national authority to promote gender dimension into R&I	<input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/innovation proposal <input type="checkbox"/> Inclusion of gender experts in the research teams is encouraged in the R&I calls <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available		
National authority has policy for integrating gender dimension in R&I	Yes		
Type of policy on gender dimension in R&I	Specific strategy / policy / measure (e.g. gender equality plan)		
Goals of policy on gender dimension in R&I	To enhance the quality of research and innovation		
Intersectional approach in policy	No	Innovation and private sector included	Yes
Impacts	RFOs own evaluations has been performed occasionally, cf single RFO responses on this issue. No evaluation on governmental level or other national HE authority performed so far. Unclear thus if to tick this box as yes or no at this point, to be decided when coding.		



<p>Context of national policy on gender dimension in R&I</p>	<p>Government instruction to SE governmental RFOs claiming their responsibility to integrate gender dimensions in research content in their funding schemes. Translation from instruction to SRC, The Swedish Research Council: “call for a gender perspective to be included in the research that the authority finances, when applicable”. Similar wording, depending on the scope and subject of other RFOS funding responsibilities.</p>	
<p>Name of national policy on gender dimension in R&I and/or relevant link(s)</p>	<p>Point 13 in Ordinance (2009:975) from the Ministry of Education with instructions for the Swedish Research Council. Förordning (2009:975) med instruktion för Vetenskapsrådet Svensk författningssamling 2009:2009:975 t.o.m. SFS 2023:8 - Riksdagen</p>	
<p>National authority has policy for promoting sex/gender analysis in university-level curricula</p>	<p>No</p>	



Vinnova Swedish Agency for Innovation Systems

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2001 at internal level)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Financial incentives/support to promote the gender dimension in research and innovation <input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Inclusion of gender experts in the research and innovation teams is encouraged in the R&I calls <input type="checkbox"/> Training on sex/gender analysis for the research and innovation team is considered as an eligible cost in the RFO funding schemes <input type="checkbox"/> Established processes to evaluate the integration of the sex/gender analysis into R&I <input type="checkbox"/> Positive action measures to favour projects that integrate sex and/or gender <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators <input type="checkbox"/> Experts on gender in R&I are included in the evaluation committees <input type="checkbox"/> Communication campaign to make visible the support to sex/gender analysis <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available <input type="checkbox"/> Supportive tools, active participation in international networks	



RFO has policy for integrating gender dimension into R&I content		Yes	
Type of policy on gender dimension in R&I		Assignment and instructions from the government	
Goals of policy on gender dimension in R&I		<p>The authority (Vinnova) must work to ensure that the gender dimension is integrated in the research and innovation that the authority finances, when applicable. Ordinance (2018:216).</p> <p>Strategy; mandatory questions for all applicants to answer; Are there any sex and/or gender perspectives relevant to the project's solutions, impacts and effects that should be taken into account in the project?</p> <p>The applicants have to answer yes or no and motivate their answers.</p>	
Intersectional approach in policy		Yes	Innovation and private sector included
Impacts of the policy		Yes	
Impacts of the policy		<p>The policy has had an impact on actors in the Swedish innovation system by bringing awareness and an increased demand on knowledge and training in this area. It has also increased the quality of applications and the relevance of the project results. Quantitatively a substantial increase of applications are now integrating sex and/or gender dimensions, however with varied quality. There is resistance in the public debate. There might be obstacles in public procurement that hinder the uptake of new solutions where sex and/or gender perspectives are integrated as existing solutions are seen as good enough and economically beneficial.</p>	



Forte, Swedish Research Council for Health, Working Life and Welfare

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2001)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Dissemination materials on the gender dimension in R&I available	
RFO has policy for integrating gender dimension into R&I content	Yes	
Type of policy on gender dimension in R&I	Assignment and instructions from the government	
Context of RFO policy on gender dimension in R&I	<p><i>Förordning (2007:1431) med instruktion för Forskningsrådet för hälsa, arbetsliv och välfärd Svensk författningssamling 2007:2007:1431 t.o.m. SFS 2018:1552 - Riksdagen</i></p> <p>Instruction from the Government: 10. integrate a gender perspective into the Authority's activities and promote gender equality in the allocation of research funds; 11. promote the inclusion of a gender perspective in the research funded by the authority, where applicable.</p>	
Goals of policy on gender dimension in R&I	<p>The authority (Forte) must work to ensure that the gender dimension is integrated in the research that the authority finances, when applicable. Ordinance (2018).</p> <p>Strategy: mandatory questions for all applicants to answer; Is a sex and/or gender perspective relevant for this project? If yes, motivate your answer and describe how this is considered in the application as a whole. If you state yes, but do not include a sex and/or gender perspective in the rest of the application (description of aims,</p>	



	possible outcomes, methods, etc) it must be motivated. If the answer is no, it has also to be motivated.			
	Intersectional approach in policy	No	Innovation and private sector included	No
Impacts of the policy	<p>When the mandatory question for applicants first was introduced it was followed-up by a study focusing on how both the applicants and the reviewers understood the question and described/assessed the answers. This initial evaluation led to improvements in the instructions to encourage more elaborated applications in this respect. We have also initiated a pilot for analysing to what degree the research funded by Forte are addressing problems related to the goals for the Swedish national gender equality policy. Preliminary results show that research funded by Forte has great potential to contribute especially to the goals concerning gender equality in health and economy (labour market).</p>			



TURKEY

The Scientific and Technological Research Council of Turkey

Type of organisation	Research Funding Agency	
Research areas funded	<input type="checkbox"/> Basic research/ blue skies <input type="checkbox"/> Applied research <input type="checkbox"/> Innovation	<input type="checkbox"/> Social sciences <input type="checkbox"/> Humanities <input type="checkbox"/> Natural sciences <input type="checkbox"/> Agricultural sciences <input type="checkbox"/> Medical and health sciences <input type="checkbox"/> Engineering and technical sciences <input type="checkbox"/> Interdisciplinary research
RFO has gender equality policy	Yes (since 2022)	
Actions taken by RFO to promote gender dimension into R&I	<input type="checkbox"/> Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal <input type="checkbox"/> Inclusion of gender experts in the research and innovation teams is encouraged in the R&I calls <input type="checkbox"/> Guidelines on the gender dimension of R&I for applicants <input type="checkbox"/> Guidelines on the gender dimension of R&I for evaluators <input type="checkbox"/> Training on the gender dimension of R&I for applicants <input type="checkbox"/> Training on the gender dimension of R&I for evaluators	
RFO has policy for integrating gender dimension into R&I content	Yes	
Type of policy on gender dimension in R&I	Specific strategy/ policy/ measure (e.g. gender equality plan)	
Context of RFO policy on gender dimension in R&I	Policy is towards the gender equality plan which includes enacting formal mechanisms for the integration of gender perspective in respective research fields.	
Goals of policy on gender dimension in R&I	The first goal is raising awareness and then increasing the influence of funded projects while taking into account the last users. The second goal is analysing inequality, gender-bias and discrimination towards the female gender in the content of the research funded.	



	Intersectional approach in policy	No	Innovation and private sector included	Yes
Link(s) to RFO policy on gender dimension in R&I	https://tubitak.gov.tr/sites/default/files/18842/gep_actionplan.pdf			

10. ANNEX II GENDERACTIONplus survey on the gender dimension in R&I content

National authorities

Gender dimension in research, teaching and innovation

This section focuses specifically on national initiatives – and regional where relevant – to promote the integration of the gender dimension in the content of research and innovation projects (i.e., sex/gender analysis in R&I). Note that these questions are not about gender balance in R&I teams. We encourage you to check our glossary for clarification of the concepts related to this section.

8.1 What kind of actions have been taken by your national authority at national level to promote the integration of the gender dimension into R&I?

Please tick all that apply (Multiple choice)

- Financial incentives/support to promote the gender dimension in research and innovation
- Financial incentives/support to promote the gender dimension in teaching content
- A specific funding programme on gender studies is in place
- Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal
- Inclusion of gender experts in the research teams is encouraged in the R&I calls
- Training on sex/gender analysis for the research team is considered as an eligible cost in national funding schemes
- Established processes to evaluate the integration of the sex/gender analysis into R&I (i.e., as part of the institution's mandate and through well-established guidelines on the evaluation)
- Positive action measures to favour projects that integrate sex and/or gender
- Guidelines on the gender dimension of R&I for applicants
- Guidelines on the gender dimension of R&I for evaluators



- Training on the gender dimension of R&I for applicants
- Training on the gender dimension of R&I for evaluators
- Experts on gender in R&I are included in the evaluation committees
- Communication campaign to make visible the support to sex/gender analysis
- Dissemination materials on the gender dimension in R&I available (videos, academic papers, leaflets...)
- Actions to promote sex/gender analysis in university-level curricula
- Other actions (please specify)

8.2 Does your national authority have a strategy or policy aimed at integrating sex/gender analysis into R&I content?

Yes / No

If no, does your national authority plan to make a strategy or policy aimed at integrating sex/gender analysis into R&I content?

Yes / No

If yes: Please explain the context of the plans

8.3 What kind of strategy or policy has your national authority adopted?

- National law
- Specific strategy / policy / measure (e.g., gender equality plan)
- Other (please specify)

8.4 What are the main goals of your strategy or policy?

8.5 Does your national/regional strategy or policy on the gender dimension in R&I include an intersectional approach?

Yes / No / not applicable

8.6 Does your national/regional strategy or policy include the innovation and private sectors in the objective of producing non-biased knowledge and solutions for society?

Yes / No / not applicable

8.7 How is the strategy/policy on the gender dimension in R&I implemented?

(Please provide information on the unit(s) responsible for implementing the policy, the actions taken so far, and the structures developed for its implementation, including technical, human and economic resources)

8.8 How is the policy/strategy on the gender dimension in R&I monitored?



(Please provide information on the actions and structures, if any, established to supervise the concrete actions developed by this national authority/other agents of the R&I system, the indicators used and their outcomes)

8.9 Has the policy/strategy on the gender dimension in R&I been evaluated?

Yes / No

[if yes: What impact/outcome has your policy on the gender dimension in R&I made?

8.10 Please explain the challenges/obstacles, if any, the national authority/ies has/have faced in implementing this policy/strategy on the gender dimension in R&I:

8.11 Please provide the title of your national/regional official policy related to the information requested above and web links or supporting documents you consider relevant for the analysis. Please specify the relevant passages and provide an English translation (e.g., machine translation).

8.12 If relevant, do regional RFOs in your country require the integration of the gender dimension in R&I projects?

Yes / No / not applicable

8.13 Does your national authority have a policy or strategy aimed at promoting sex/gender analysis in university-level curricula?

Yes / No

8.14 Finally, what would your national authority need to advance some of the measures mentioned above or others to promote the gender dimension in the R&I content?

- Financial resources
- More awareness on the relevance on sex/gender analysis for R&I
- Exchange experiences on how to consider the gender dimension in R&I from an intersectional perspective
 - Capacity-building
 - Training materials
 - Mandatory policies (e.g., conditional funding)
 - Other needs (please specify)

RESEARCH FUNDING ORGANISATIONS

Gender dimension in research and innovation



This section focuses specifically on RFOs initiatives to promote the integration of the gender dimension in the content of research and innovation projects (i.e., sex/gender analysis in R&I). Note that these questions are not about gender balance in R&I teams. We encourage you to check our glossary for clarification of the concepts related to this section.

6.1 What kind of actions has your RFO taken to promote the integration of the gender dimension into R&I? (Please tick all that apply)

- Financial incentives/support to promote the gender dimension in research and innovation
- A specific funding programme on gender studies is in place
- Requiring applicants to specify whether they are considering sex and/or gender in their research/ innovation proposal
 - Inclusion of gender experts in the research teams is encouraged in the R&I calls
 - Training on sex/gender analysis for the research team is considered as an eligible cost in the RFO funding schemes
 - Established processes to evaluate the integration of the sex/gender analysis into R&I (i.e., as part of the institution's mandate and through well-established guidelines on the evaluation)
 - Positive action measures to favour projects that integrate sex and/or gender
 - Guidelines on the gender dimension of R&I for applicants
 - Guidelines on the gender dimension of R&I for evaluators
 - Training on the gender dimension of R&I for applicants
 - Training on the gender dimension of R&I for evaluators
 - Experts on gender in R&I are included in the evaluation committees
 - Communication campaign to make visible the support to sex/gender analysis
 - Dissemination materials on the gender dimension in R&I available (videos, academic papers, leaflets...)
 - Other actions (please specify)

7.2 Does your RFO have a specific strategy or policy aimed at integrating the gender dimension into R&I content?

Yes / No

If no, does your RFO plan to make a strategy or policy aimed at integrating sex/gender analysis into R&I content?

Yes / No

If yes: Please explain the context of the plans

7.3 What kind of strategy or policy has your RFO adopted?

- National law
- Specific strategy / policy / measure (e.g., gender equality plan)



- Other (please specify)

7.4 What are the main goals of your strategy or policy?

7.5 Does your strategy or policy on the gender dimension in R&I include an intersectional approach?

Yes / No / not applicable

7.6 Does your strategy or policy include the innovation and private sectors in the objective of producing non-biased knowledge and solutions for society?

Yes / No / not applicable

7.7 How is the strategy /policy implemented?

(Please provide information on the unit(s) responsible for implementing the policy, the actions taken so far and the structures developed for its implementation, including technical, human and economic resources)

7.8 How is the strategy /policy/strategy monitored?

(Please provide information on the actions and structures, if any, established to supervise the concrete actions developed by the RFO/other agents of the R&I system, the indicators used and their outcomes)

7.9 Has the policy/strategy been evaluated?

Yes / No (filter)

[if yes: What impact/outcome has your policy on the gender dimension in R&I made?

7.10 Please explain the challenges/obstacles, if any, has your RFO faced in implementing this policy/strategy on the gender dimension in R&I:

7.11. Please provide the title of your RFO official policy related to the information requested above and web links or supporting documents you consider relevant for the analysis. Please specify the relevant passages and provide an English translation (e.g., machine translation).

7.12 Finally, what would your RFO need to advance some of the measures mentioned above or others to promote sex and gender analyses and integration of the gender dimension in the R&I content? (please tick all that apply)

- Financial resources
- More awareness on the relevance on sex/gender analysis for R&I
- Exchange experiences on how to consider the gender dimension in R&I from an intersectional perspective
- Capacity-building
- Training materials



- Mandatory policies (e.g., conditional funding)
- Other needs (please specify)

