

HOW TO PROMOTE GENDER IN PARTNERSHIPS

The Committee on Industry, Research and Energy (ITRE) of the European Parliament will discuss in the coming weeks Horizon Europe partnerships. Moreover, the ITRE Committee recently held a structured dialogue with the Commissioner for Innovation, Research, Culture, Education and Youth to discuss the key priorities of the Commission in Research and Innovation (R&I). [GENDERACTION policy briefs on Horizon Europe](#) have aimed to influence the negotiations on every aspect of the new Framework Programme. **This policy brief on European partnerships has been prepared with the target of reaching the discussions at the European Parliament level and supporting members of the ITRE Committee in its commitment to promote gender equality in R&I.**

Horizon Europe Partnerships

The status of gender issues in H2020 Co-fund initiatives has been quite uneven. While some Joint Programming initiatives such as the [JPI Climate](#) have addressed gender issues, others have taken into account neither gender balance nor sex/gender analysis in their joint activities. This is not surprising given that in almost none of the official documents on partnerships there is a mention of gender issues. The time has come to mainstream gender in the future partnerships of Horizon Europe in a focused and consistent manner. One of the first challenges for future partnerships in Horizon Europe is to close the gap among the more and less experienced partnerships in gender equality policies in R&I.

According to the [Strategic Plan 2021-2024](#), European Partnerships are initiatives

where the EU together with private and/or public partners commit to jointly support the development and implementation of a programme of R&I activities. Partnerships are therefore considered to be in a unique position to address complex challenges that require an integrated approach since they bring together a wide range of actors across countries on the basis of a common vision and a shared roadmap.

The Strategic Plan 2021-2024 has identified 16 co-funded European partnerships and 12 co-programmed partnerships while the one on Pandemic Preparedness may be co-funded or co-programmed. Although there are also institutionalised partnerships based on Article 185/187 of the TFEU, this policy brief focuses on recommendations applicable to most of the actions developed in co-programmed and co-funded European partnerships:

CO-PROGRAMMED

Based on Memoranda of Understanding / contractual arrangements; implemented independently by the partners and by Horizon Europe.

CO-FUNDED

Based on a joint programme agreed by partners, commitment of partners for financial and in-kind contributions & financial contribution by Horizon Europe.

Source: Shadow SPC. Horizon Europe. Workshop 22 January

How to Promote Gender in Partnerships

GENDERACTION recommends different actions to be considered by the ITRE in their discussions on Horizon Europe partnerships both at the governance level and at the co-funded projects level:

Governance level European Commission

- Co-funded European partnerships have to use the standard Horizon Europe award criteria as **selection criteria for co-funded projects**, that is, “Excellence”, “Impact” and “Quality and Efficiency of the Implementation”. It is crucial that the European Commission (EC) highlight and clarify the necessary gender perspective when considering these selection criteria.
- All partnerships need to establish a monitoring system to track progress towards objectives and impacts (KPI). An EC recommendation to incorporate **gender indicators in partnership KPIs** may well contribute to mainstreaming gender in the whole partnership performance.
- In order to facilitate the process of systematically integrating gender in future partnerships, gender expertise – at least external, ad hoc advice – should

be considered in all the **governance structures and decision-making bodies** of the EC regarding partnerships. Examples of these structures and bodies include the Strategic Coordination Process (SPC), the Partnership Knowledge Hub, the Independent Expert Group that is supporting the SCP in the design of monitoring indicators, the partnership experts committee that will evaluate Horizon Europe partnerships, among others.

- The support to **specific joint initiatives on gender research** in order to advance in the alignment of agendas and objectives regarding gender equality in R&I. Gender studies are an interdisciplinary research field with a wide community of specialised researchers in the ERA. The sustainability of co-funded initiatives such as [GENDERNET Plus](#) that covers transnational research proposals with a particular focus on gender and the UN SDGs, should be considered.

High Level Group on Joint Programming (GPC)

- The [GPC](#) has established ad hoc cooperation initiatives with the GENDERACTION project in order to give advice on gender equality policies in R&I to the Group. However, a more systematic cooperation between GPC and SWG GRI

may lead to establishing long-term indicators to **monitor the impact of Joint Programming Initiatives** on alignment and added value for science and society also from a gender perspective.

ERA-LEARN

- Data on partnerships and outcomes in a central IT tool will be available with the support from [ERA-LEARN](#). The data structure to obtain detailed proposal level information and more detailed project level information should consider data on gender balance at both levels. The resulting dashboard should have **sex-disaggregated data and gender indicators** when applicable.
 - Templates of co-funded calls should ensure a consistent and comparable data management system for research projects with gender statistics.
- Information on gender equality as a core objective of the EC for R&I should be strengthened in the RRI guidelines provided on the ERA-LEARN website, including updated related files from the EC on gender equality (e.g. factsheets on GE and information on GEPs). Reports on the status of gender equality and the integration of the gender dimension in partnerships as well as **specific guidelines for partnerships** could be also developed with the support of gender experts.

Gender Expertise Within Partnerships

- **Gender expertise** that can give advice on gender equality policies, gender-sensitive criteria, gender bias and intersectionality, should be included **in the governance structure of every partnership**.
- In order to close the gap between the more and less experienced partnerships in gender equality policies in R&I, **mutual learning and sharing of promising practices** should be in place. These

may take the form of regular exchanges among different working groups on gender issues through networks or communities of practices.

Co-funded projects level

Topics

- Research Funding Organisations (RFOs), both public and private agencies and Ministries with competencies in research funding, as key players of European partnerships, should count on gender experts – at least external, ad hoc advice – when defining topics. This is crucial for a proper integration of **sex/gender analysis and the intersectional perspective** demanded by the EC. European Partnerships may consider including gender specific topics in the joint research calls as well as flagging those topics where the gender dimension is relevant.
 - The report [Gendered Innovations II](#) has recently provided examples of research projects in multiple disciplines that successfully address sex/gender analysis and produce science results of a high quality and also significant innovations.

Research Calls

- Research calls of joint initiatives should **encourage women to apply**, especially in those partnerships with a long tradition of women's underrepresentation among PIs and research teams. The communication action should not be targeting women only, but also potential consortia and beneficiary institutions to include more women researchers in the research teams, particularly young women researchers, and to distribute roles and responsibilities in a fair and equitable manner.
 - [QUANTERA II](#) may well be a promising practice due to its Gender Equality Statement in the 2021 call announce-

ment. Gender is mentioned in the composition of research teams, evaluation panels and as one of the tie-breaking criteria. Consider that quantum technologies is a field with a traditional imbalance.

- For those topics that are flagged as “gender” relevant, **training on the integration of gender analysis into research and innovation** could be considered as an eligible cost in joint research calls as a way to promote this expertise within the co-funded projects. The adoption of inclusive and participatory **Gender Equality Plans** (GEPs) in the beneficiary institutions as eligibility criteria for joint research calls, as established in Horizon Europe. Research funders, that are also beneficiaries of the Framework Programme (for instance in the H2020 SwaFS programme as well as in partnerships), could become role models in the adoption of inclusive GEPs.

Evaluation Panel & Criteria

- **Gender balance in evaluation panels** of joint transnational calls is in line with one of the objectives of the EC regarding gender equality in R&I: gender balance in decision-making and experts bodies. While several partnerships have already considered inviting more women as reviewers of proposals, STEM partnerships still face difficulties in achieving gender-balanced evaluation panels due to the underrepresentation of women in some fields.
- Co-funded European partnerships have the possibility of reviewing the three Horizon Europe award criteria from a gender perspective. To give some examples:
 - **Excellent science** avoids any bias in the content of research and produces results that benefit the whole society. Thus, gender and diversity perspectives in the content of research could be list-

ed among the assessment criteria for scientific quality.

- **Research impacts** include socio-economic impact as well as the transfer and communication of results to society at large, taking into account women’s and men’s needs. Gender-sensitive communication, including gender balance in communication and dissemination actions and inclusive language, should be encouraged in funded projects.
- **Quality of the implementation** refers also to fair allocation of resources, tasks, positions, and visibility. To give just two examples: gender balance in the leadership of research teams and in the authorship of academic papers.
- The adoption by partnerships of the recently announced policy of the EC for Horizon Europe that makes **sex/gender analysis a mandate in joint research calls** – where applicable – would mean a qualitative leap. This would provide the necessary coherence to the new Framework Programme in terms of avoiding gender-biased research.

Monitoring & Evaluation

- There is room for improvement in the monitoring and evaluation of co-funded projects from a gender perspective. Although some co-fund initiatives consider basic indicators such as sex-disaggregated data of PIs, there is no proper analysis of the co-funded project performance in terms of gender equality, the gender dimension in R&I content and socio-economic impact from a gender perspective.
 - [GENDERNET Plus](#) can be a source of inspiration for other ERANET co-funds since this consortium has included 16 gender indicators in its monitoring & evaluation procedure that follows a mixed qualitative and quantitative approach to data collection and analysis of co-funded projects.

Conclusions

European Partnerships are intended to play a key role in achieving the EU's strategic objectives on science, technology, and innovation. Addressing the three main objectives of the EC on gender equality in R&I (gender equality in research careers, gender balance in decision-making and leadership, and gender dimension in research content) through partnerships is of utmost importance for the coherent development of the new Framework Programme in terms of responsible R&I. The ITRE Committee **has the opportunity to influence the design of the new partnerships** that will be launched under Horizon Europe by **stressing the message of gender equality** in the dialogues with the European Commission.

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