



# Gender equality provisions in Horizon Europe

Cluster 3 Info Day

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# Gender equality: a crosscutting priority in Horizon Europe



Gender Equality Plan: **Eligibility Criterion** for public bodies, research organisations and higher education establishments from Member States or Associated Countries



Integration of the **gender dimension into R&I content** is mandatory by default unless specified otherwise in the topic description. **Award Criterion** under the *Excellence* criterion (methodology)



Gender balance among researchers in leading positions: a **Ranking Criterion** – for ex aequo proposals. Researchers can declare their gender along three categories **woman, man, non-binary**



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HORIZON EUROPE ELIGIBILITY CRITERION

# Gender Equality Plan eligibility criterion





# Eligibility criterion

- Formal **requirement** to make sure that only eligible beneficiaries/actions receive a grant.
- Checked **before signature** of the grant and must be complied with **throughout the action duration**.

## Implications of non-compliance:

- **At proposal stage:** Not meeting an eligibility condition leads to rejection of the proposal.
- **During implementation:** Loss of eligibility during an ongoing grant normally leads to **termination**. Moreover, costs become **automatically ineligible** as from the date of loss of eligibility.



# GEP eligibility criterion

- **Gender Equality Plan** (GEP) is a set of commitments and actions that aim to promote gender equality in an organisation through a process of structural change.
- Having a GEP is an eligibility criterion for all **public bodies, private and public higher education institutions and private and public research organisations from EU Member States and associated countries** wishing to participate in Horizon Europe **as beneficiaries or affiliated entities**. Other types of beneficiaries (e.g. SMEs) do not need to have a GEP.
- An organisation may not yet have a GEP at proposal submission stage, but it must have a GEP in place at the time of the Grant Agreement signature and during implementation of the project.
- The organisation has to fill in the GEP questionnaire in the Funding & Tenders Portal to self-declare that it has a GEP complying to all mandatory requirements.
- **Applicable for calls with deadlines in 2022 and onwards.**



# Mandatory GEP process-related requirements



## Public document

- Formal document
- Published on the institution's (public) website
- Signed by top management



## Dedicated resources

- Commitment of resources and expertise in gender equality to implement the plan



## Data collection and monitoring

- Sex/gender disaggregated data on personnel (and students, for establishments concerned)
- Annual reporting based on indicators

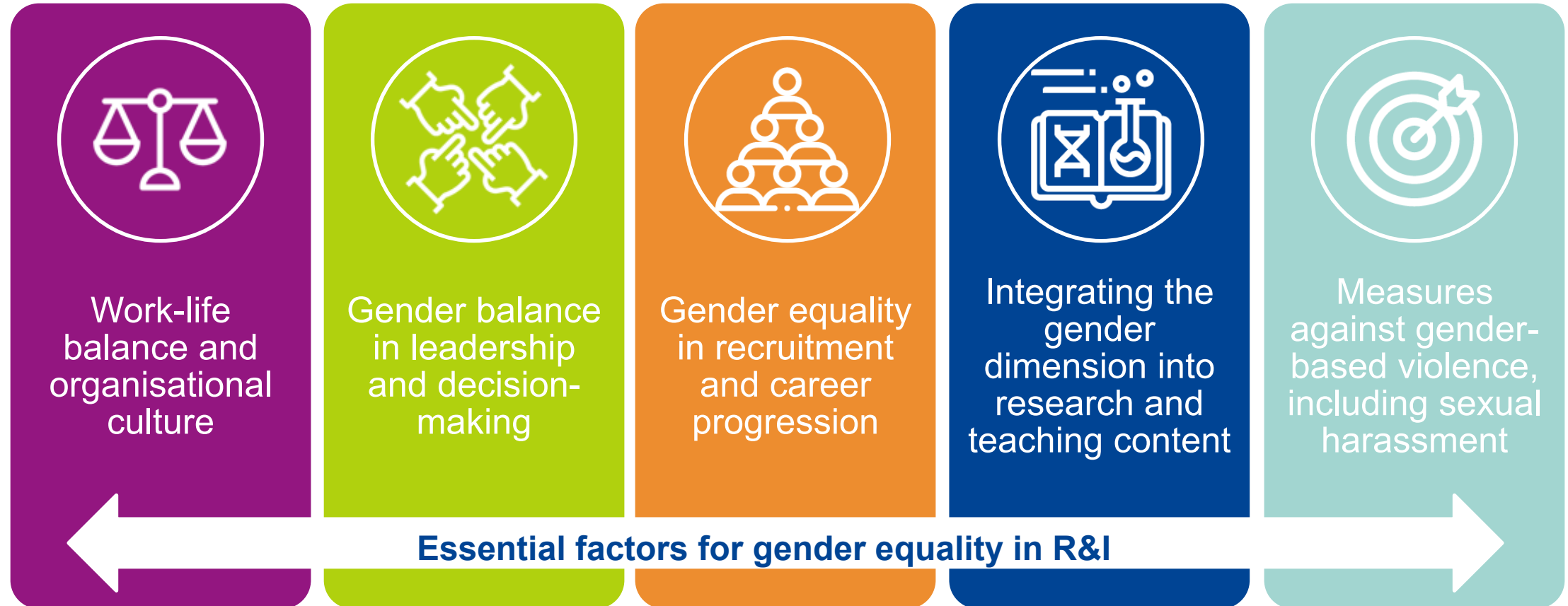


## Training

- Awareness raising/training on gender equality and unconscious gender biases
- For staff and decision-makers



# Recommended GEP content areas







# GEP eligibility compliance pilot check

- Random sample of **29 organisations** selected out of **2,352 legal entities** subject to the GEP eligibility criterion with project funded **under a topic with deadline in 2022**. Distribution of the random sample **roughly at pro rata of the distribution of total sample**.
- Out of 29 organisations
  - 12 (41%) organisations were found compliant or indecisive,
  - 17 (59%) were found non-compliant, including 3 organisations failing to provide a GEP as such
  - In case of 3 organisations, the process to terminate the participation of the beneficiary was launched. Two provided later evidence that was accepted. One organisation was fined.
  - All organisations were provided with a list of recommendations from experts carrying out the GEP compliance check.

## Recommendations for organisations

- Follow the **exact** wording of the GEP eligibility criterion wording as it is in Horizon Europe General Annexes and incorporate these activities **explicitly** in your GEP.
- **You must comply in all 4 mandatory requirements (i.e. 10 components) to be compliant.**
- Be ready to provide the evidence of implementation of mandatory requirements of the criterion (e.g., attendance sheet/s/, have evidence of the requested topic covered by training, provide annual reports, etc.).



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HORIZON EUROPE AWARD CRITERIA

# Integration of the gender dimension in R&I content







# Award Criteria: Integration of the gender dimension

## EXCELLENCE criterion for RIAs/IAs/Cofunds

- ✓ Clarity and pertinence of the **project's objectives**, and the extent to which the proposed work is ambitious, and goes beyond the state-of-the-art.
- ✓ **Soundness of the proposed methodology**, including the underlying concepts, models, assumptions, inter-disciplinary approaches, **appropriate consideration of the gender dimension in research and innovation content**, and the quality of open science practices including sharing and management of research outputs and engagement of citizens, civil society and end users where appropriate.

*Proposals aspects are assessed to the extent that the proposed work is within the scope of the work programme topic*





# Integration of the gender dimension in R&I content

## Gender dimension

*Addressing the gender dimension in research and innovation entails taking into account sex and gender in the whole research & innovation process*

Under Horizon Europe the **integration of the gender dimension into R&I content** is **mandatory** unless the topic description explicitly includes a sentence such as the following:

*“In this topic the integration of the gender dimension (sex and gender analysis) in research and innovation content is not a mandatory requirement.”*

## Why is taking into account the gender dimension important?

- Every cell is sexed and every person is gendered
- **Brings added value of research in terms of excellence, rigor, reproducibility, creativity and business opportunities**
- Brings an in-depth understanding of **all people's needs, behaviours and attitudes**
- Goods and services better suited to the needs of all citizens
- **Enhanced societal relevance of research and innovation**





# Integration of the gender dimension in R&I content

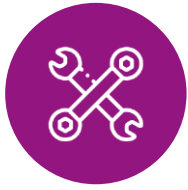
*Umbrella term referring to the integration of **sex analysis** and/or **gender analysis** into R&I design and content*

**SEX** refers to the **biological attributes** (functions deriving from chromosomal complement, reproductive organs, or specific hormones or environmental factors that affect the expression of phenotypic traits in sexually reproducing organisms) that distinguish male, female, and intersex (in humans) or hermaphrodite (in non-human animals). **In engineering and product design research**, sex includes anatomical and physiological characteristics that may affect the design of products, systems and processes

**GENDER** refers to **socio-cultural norms, identities and relations** that, together, shape and sanction “feminine” and “masculine” behaviours, structure societies and organisations, and **also affect products, technologies, environments, and knowledge**. Gender is complex and changes in time and place

Should be taken into account from the setting of research priorities, through defining concepts, formulating research questions, developing methodologies, gathering and analysing sex and gender disaggregated data, to reporting results, and transferring them to markets into products and innovations which will benefit all citizens and promote gender equality





# Integration of the gender dimension into R&I content: Tips

## ➤ Check whether and to what extent:

- the sex and/or gender of persons under study in the action
- the sex and/or gender of individuals affected by the implementation of the research and innovation results (e.g. end users)

**is integrated in your proposal (methods, objectives, work packages, deliverables, etc.)**

- Are **data collection** methodologies, questionnaires, surveys, focus groups, etc., designed to unravel potentially relevant sex and/or gender differences, included in the proposal and deliverables?
- Have you checked the **existence of literature on sex/gender analysis** in your proposal's field?

## See also:

- **This Gendered Innovations [website](#)** (with additional case studies, on e.g. water management)
- **This [introductory webinar by H2020 project GE Academy](#) and [additional more field-specific videos](#)**
- **This [introductory video produced by H2020 project ACT](#)**
- **This [GEAR tool](#)**



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HORIZON EUROPE RANKING CRITERIA

# Gender balance among researchers in leadership positions







# Ranking Criteria for ex aequo proposals

- **Method to establish the priority order**

For each group of proposals with the same score, starting with the group achieving the highest score and continuing in descending order:

1. Aspects of the call that have not otherwise been covered by more highly ranked proposals
2. Scores on 'Excellence' then on 'Impact' (for IAs, scores on 'Impact' then 'Excellence')
3. **If necessary, the gender balance among the researchers with a leading role named in the researchers table in the proposal, will be used as a factor for prioritisation.**
4. Geographical diversity

...





# Inclusive approach to gender identity

Researchers can declare their gender along three categories: **woman, man, non-binary**

## Researchers involved in the proposal

Include only the researchers involved in the proposal, (see below definition of 'researcher'). You do not need to include in the table the identity of other persons involved in the proposal who are not researchers.

'Researchers are professionals engaged in the conception or creation of new knowledge. They conduct research and improve or develop concepts, theories, models, techniques instrumentation, software or operational methods. (Frascati Manual 2015)'

Include also person in charge of the proposal if a researcher.

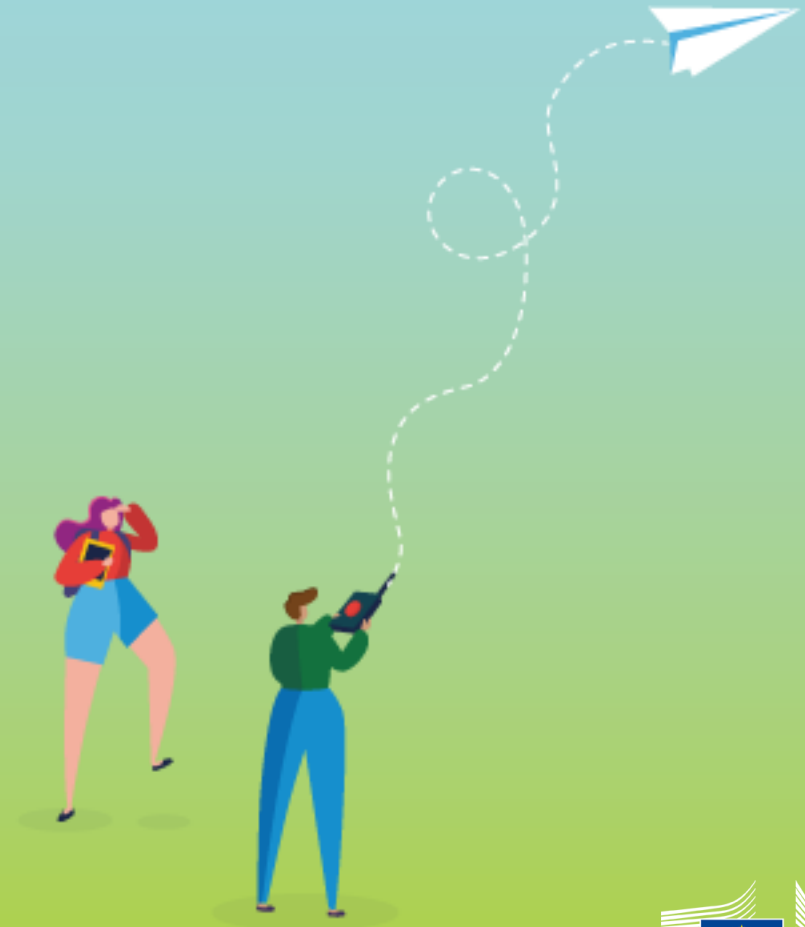
Title	First Name	Last Name	Gender	Nationality	E-mail	Career stage <sup>1</sup>	Role of researcher (in the project)	Reference Identifier	Type of identifier
			[Woman] [Man] [Non-binary]			[Category A – Top grade researcher] [Category B – Senior researcher] [Category C – Recognised researcher] [Category D – First stage researcher]	[Leading] [Team member]		[ORCID] [Researcher Id] [Other - specify]





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# Useful resources





# Latest publications

- Zero-Tolerance Code of Conduct. Counteracting gender-based violence, including sexual harassment, in the EU Research and Innovation System
- Framework for the integration and evaluation of inclusive gender analysis in research and innovation content
- Impact of gender equality plans in the European Research Area: Factsheet; Policy briefs & Main study
- She Figures 2024: main report, 27 country fiches, updated handbook, policy thematic reports, infographic, data tool
- Fostering gender equality - Key figures from Horizon Europe

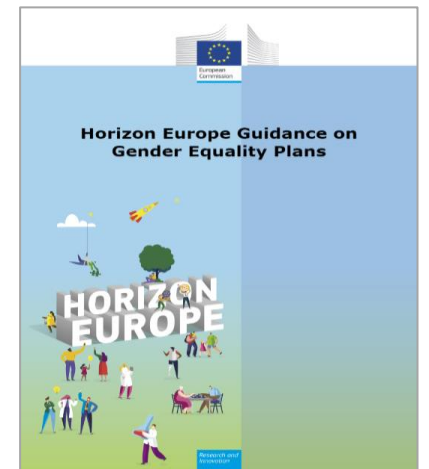






# Supporting GEP practice and knowledge

- Since 2021 frequent participation of the Gender Sector in NCP meetings and InfoDays of various parts of Horizon Europe; replies to RES questions, etc.
- Webinar: [The Gender Equality Plan eligibility criterion in Horizon Europe: Who is concerned? How to comply with it?](#)
- [GEAR tool](#): advice and tools on how to set up a GEP to evaluating its impact
- Examples of GEPs and their implementation
  - [Horizon Europe](#) (inclusive GEPs: [SUPPORTER](#), [AGRIGEP](#), [BUDGET IT](#), [NEXUS](#), [INCLUDE](#), [SEE-ERA](#), [GEPINC](#))
  - [Horizon 2020](#) (e.g., [CALIPER](#), [GEARING-Roles](#))
  - [GEAR tool](#) (search engine with filters)
  - [Gender Equality Champions](#)
- **Pilot EU ‘knowledge & support facility on GEPs (2021-2022)**
  - Detailed [Horizon Europe Guidance on Gender Equality Plans](#)
  - Online trainings and mutual learning workshops
- **Upcoming EU Gender Equality Competence Facility** (open public procurement)
  - Online trainings, mutual learning workshop, e-learning







# GEPs impact

## Impact of GEPs across the European research area

- Report including case studies, policy briefs, and benchmarking
  - ✓ [Main study](#)
  - ✓ [Factsheet](#)
  - ✓ [Policy briefs](#)

## Impact of GEPs: national level

- E.g., in the CZ the share of GEPs in public research organisations rose from 11% in 2022 to 89% in 2024.

## EU Award for Gender Equality Champions ([web](#))

- Sustainable Gender Equality Champions
- Newcomer Gender Equality Champions
- Inclusive Gender Equality Champions
- **2025 edition [opened](#) on 7 May 2025**





# Resources on integrating the gender dimension

- [Policy Review Report](#) Gendered Innovations 2: How inclusive analysis contributes to research and innovation (25/11/2020)
- [Framework for the integration and evaluation of inclusive gender analysis in research and innovation content](#)
- **Gendered Innovations [website](#) with additional case studies** (developed by Stanford University in collaboration with DG RTD). You can [subscribe](#) to a dedicated mailing list, for notifications on recent developments
- **[Nature series on sex and gender in science launched in May 2024](#)**, including, e.g.: [Why it's essential to study sex and gender, even as tensions rise](#); [We need more-nuanced approaches to exploring sex and gender in research](#);





# ERC online workshop on the sex and gender dimension in frontier research (16/11/2021)

09:00 – 10:15 Opening address by **Mariya GABRIEL**, Commissioner for Innovation, Research, Culture, Education and Youth (pre-recorded audio)



<https://erc.europa.eu/event/sex-and-gender-dimension-frontier-research>

Introduction by **Barbara ROMANOWICZ**, Member of the ERC Scientific Council, and **Isabelle VERNOS**, Center for Genomic Regulation (ES)

Keynote: **Sabine OERTEL-PRIGIONE**, Radboud University (NL) - [Presentation](#)

[Q&A](#)

[WATCH THE OPENING ADDRESS](#)



<https://cordis.europa.eu/article/id/422455-how-frontier-research-advances-innovative-ideas-and-perspectives-on-gender>









# Thank you for your attention !

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