



Institute of Sociology  
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gender & science

# GENDER EQUALITY PLANS AS A CATALYST FOR CHANGE

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# GENDER EQUALITY IN THE ERA

- Since 2012, gender equality and gender mainstreaming are one of ERA priorities
- 3 objectives
  - Gender balance in research teams
  - Gender balance in decision-making
  - Gender dimension in research (and increasingly teaching) content
- Policy framework
  - **Institutional change through gender equality plans** marks a shift in approach from “fixing women” to “fixing institutions” and “fixing knowledge”
  - 2015 CC on advancing gender equality in ERA (14846/15) encouraged making the **institutional change a key element of their national policy framework on gender equality in R&I**

# EUROPEAN POLICY

- **The new European Research Area**

- Communication from the Commission A new ERA for Research and Innovation (COM/2020/628 final)

a new concept for the ERA which consists in **deepening existing priorities and initiatives**... As regards gender equality, the Commission proposes, as of 2021, in line with the Horizon Europe programme objectives, the development of **inclusive gender equality plans** with MS and stakeholders in order to promote gender equality in European R&I.

- Council Conclusions on the New European Research Area of 1 December 2020 (13567/20)

Article 27.ii: “CALLS on the Commission and Member States for a renewed focus on gender equality and mainstreaming, including through the **instrument of gender equality plans** and the integration of the gender dimension into R&I content. [and] INVITES Member States and research funding organisations to advance measures to ensure that allocation of research funding is not affected by gender bias.”

- Council Conclusions on the future governance of the European Research Area

- **ERA Policy Agenda** – Action 5: Promote gender equality and foster inclusiveness, taking note of the Ljubljana declaration (adoption at COMPET 26 November)

# EUROPEAN POLICY

- Gender in Horizon Europe including the eligibility criterion
- EU Pact for Research and Innovation
- The Ljubljana Declaration – adopted by 33 countries including 23 Member States and including **the Republic of Serbia**
- Importance of a **policy coordination structure** in place to push and implement at EU and national levels (Wroblewski 2021)
  - Standing Working Group on Gender in Research and Innovation
  - H2020 GENDERACTION project
- **Uneven policy development** (Linkova & Mergaert 2021)



# MAIN CHALLENGES TO GEP IMPLEMENTATION

- Policy coordination to build a common definition of the GEP requirement
- Building political consensus to achieve substantive change through GEPs
- Uptake of GEPs by RPOs at national level
- Monitoring and evaluation of GEP implementation
- Capacity building at policy and institutional level
- Mobilising support and resources at national level
- Mutual learning exercises and guidance
- Commensurability of GEP requirements between the public and private sectors

EUROPEAN UNION



# HORIZON EUROPE

#HorizonEU



# Main changes in Horizon Europe compared to Horizon 2020

- **Eligibility: Gender Equality Plans**
  - As of 2022, applicant institutions must have a gender equality plan (in place by the time of the grant agreement signature)
- **Award criteria:** Integration of the gender dimension in the R&I content becomes a default requirement
- **Ranking factor:** Gender balance for ex aequo proposals
- Gender equality as a **cross-cutting priority**



# Main changes in Horizon Europe compared to Horizon 2020

- Dedicated funding
  - Development of **inclusive gender equality plans**
  - **Intersectional gender+ research** (cluster 2 of pillar II Culture, Creativity and Inclusive Society)
- **European Innovation Council (EIC)**
  - 40% representation of women-led companies among the submitted projects
  - Target of 50% representation of women in advisory bodies
  - Women Innovator Award
  - Special initiatives to support women-led start-ups
- Ensuring a balanced representation among **evaluators** and other relevant **advisory bodies**

# GEP as an eligibility criterion

- A GEP is mandatory for **calls with deadline from 2022 onwards** (until then transition period) for public bodies, research organisations and higher education\*
- **Self-declaration** by applicants at the proposal stage, certifying compliance with the defined requirements (building blocs) **through GEP eligibility criterion questionnaire**
- Included in the **entity validation process** (based on self-declaration)
- **Random checks by the EC in the course of Horizon Europe**
- If all minimum requirements and the recommended areas are met, another strategic document can be considered as a GEP
- **Does not apply to private companies** including SMEs, non-profit non-governmental organizations, civil society associations and any type of organisations from non-associated third countries
- Grant Agreement commits beneficiaries to taking measures to promote gender equality in implementation of action and, where applicable, in line with their GEP

# Mandatory process related blocks

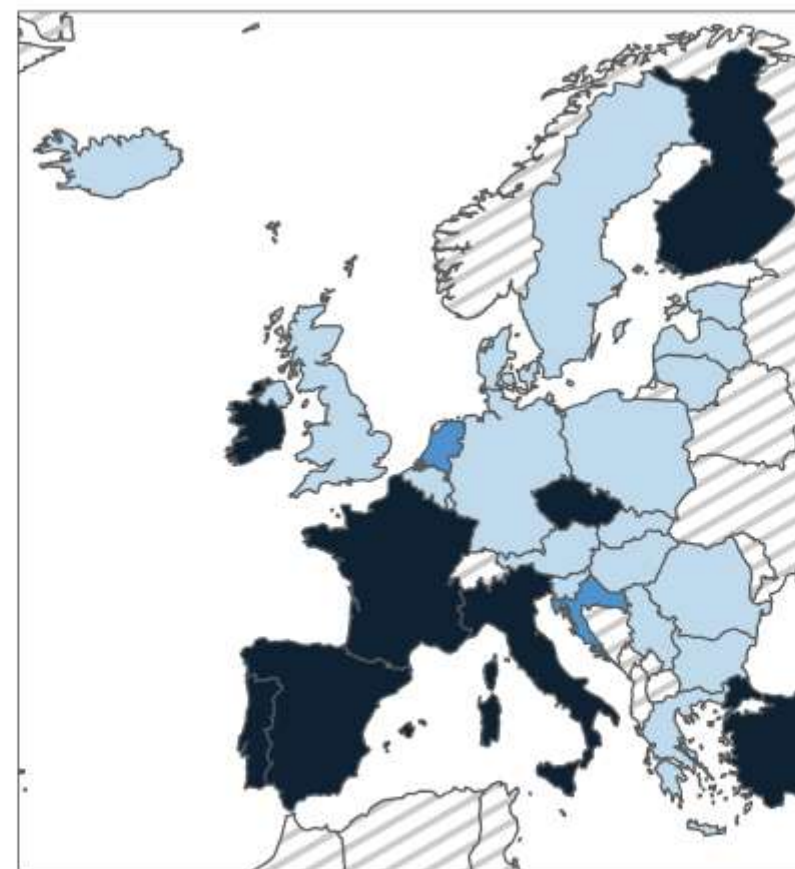
- **PUBLIC**: official document publicly available on the web and signed by top management, disseminated across the institution (under discussion what public means – intranet, POPD)
- **RESOURCES**: allocation of human and financial resources (GE positions / teams, allocated time to work)
- **MONITORING AND EVALUATION**: collection of gender segregated data including management, annual reports and evaluation of progress and outcomes
- **TRAININGS AND CAPACITY BUILDING**: whole organization engagement (not only researchers), capacity building and training activities, tackle unconscious bias and stereotypes

Defined in General Annexes available at [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-13-general-annexes\\_horizon-2021-2022\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-13-general-annexes_horizon-2021-2022_en.pdf)

## Recommended thematic areas

- Work-life balance and organisational culture
- Gender balanced in leadership and decision-making
- Gender balance in recruitment and career progression
- Integrating the gender dimension into research and teaching content
- Measures against gender-based violence, including sexual harassment

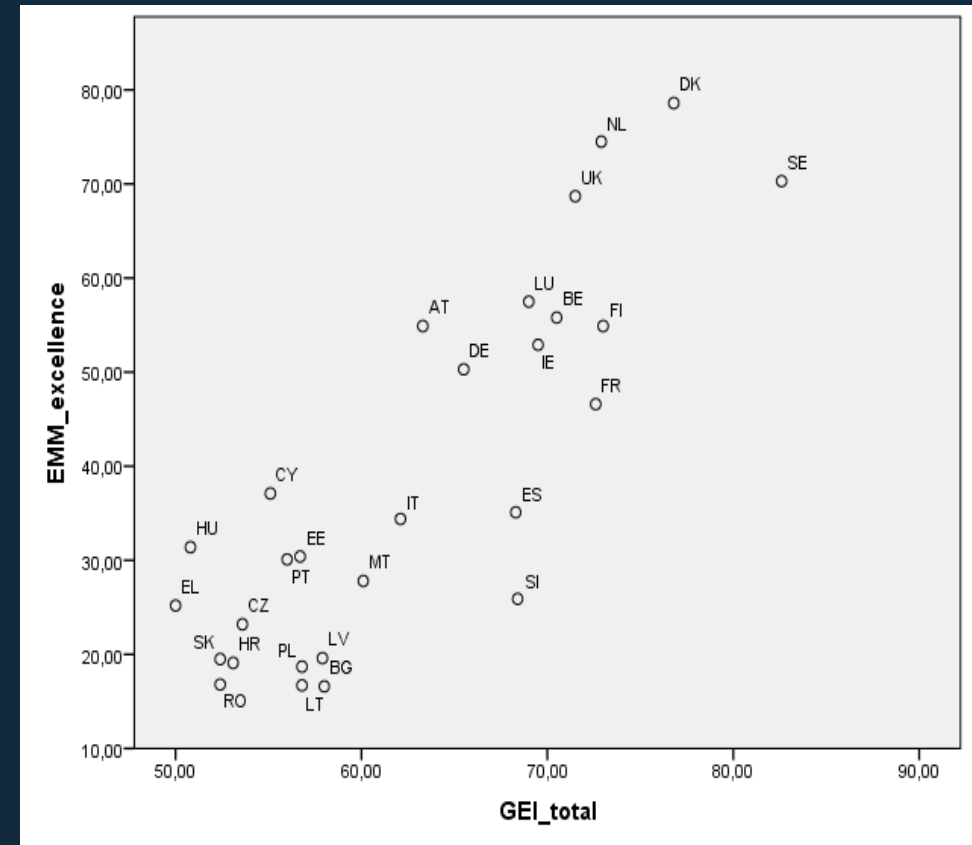
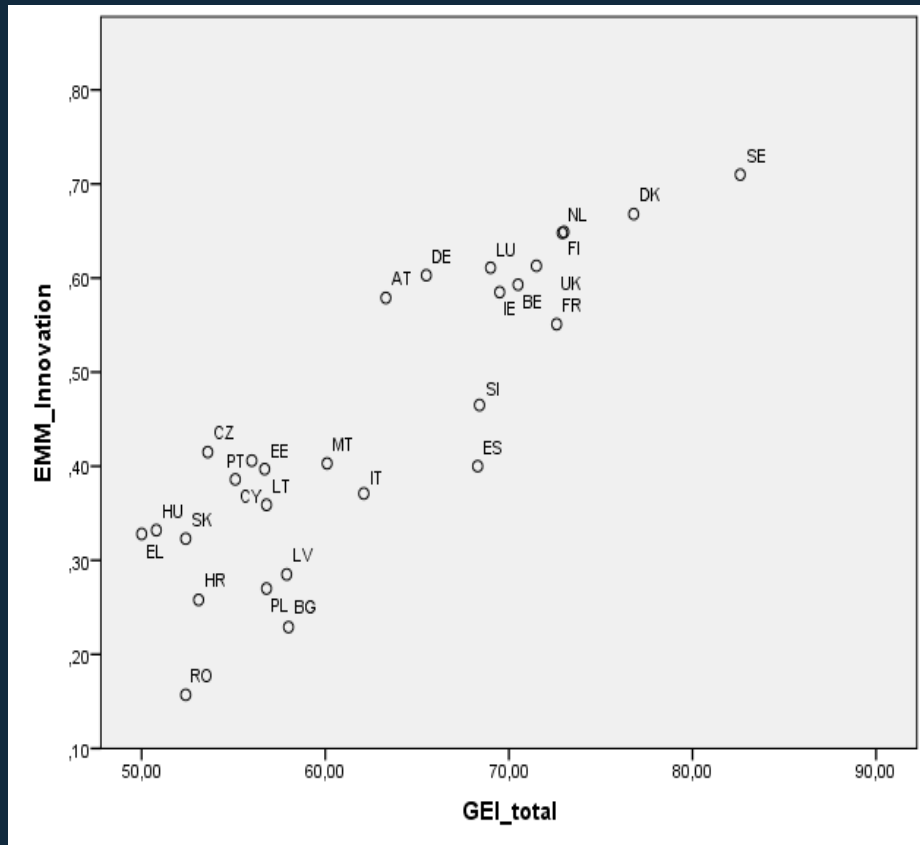
# National policies to combat GBV



■ Yes ■ It is planned ■ No ■ Not included in the study

Fajmonova, V. et al. 2021. D3.2 Report on the European Baseline. [UniSAFE](#).

# Innovation capacity and gender equality correlate



Source: Wroblewski, A. 2021. D3.3 [Monitoring of ERA Priority 4 Implementation – update and final assessment](#) [online]. GENDERACTION project.

# Support by the European Commission

- [EIGE Gear Tool](#)
- GE Academy
  - <https://ge-academy.eu/> - trainings, webinars, Train the Trainers
- Factsheet on gender in Horizon Europe
  - [https://ec.europa.eu/info/sites/default/files/research\\_and\\_innovation/strategy\\_on\\_research\\_and\\_innovation/documents/ec\\_rtd\\_gender-equality-factsheet.pdf](https://ec.europa.eu/info/sites/default/files/research_and_innovation/strategy_on_research_and_innovation/documents/ec_rtd_gender-equality-factsheet.pdf)
- The Commission's Gender Equality Strategy
  - [https://ec.europa.eu/info/research-and-innovation/strategy/strategy-2020-2024/democracy-and-citizens-rights/gender-equality-research-and-innovation\\_en](https://ec.europa.eu/info/research-and-innovation/strategy/strategy-2020-2024/democracy-and-citizens-rights/gender-equality-research-and-innovation_en)
- FAQ
  - <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/faq;grantAndTendertype=1;categories=;programme=HORIZON;actions=;keyword=GEP;period=null>
  - [https://ec.europa.eu/info/sites/default/files/research\\_and\\_innovation/strategy\\_on\\_research\\_and\\_innovation/documents/ec\\_rtd\\_gep-faqs.pdf](https://ec.europa.eu/info/sites/default/files/research_and_innovation/strategy_on_research_and_innovation/documents/ec_rtd_gep-faqs.pdf)
- Contact: [RTD-HORIZON-EU-GENDER-EQUALITY-PLAN@ec.europa.eu](mailto:RTD-HORIZON-EU-GENDER-EQUALITY-PLAN@ec.europa.eu)

# Useful links

- [RRI Tools](#) – gender equality
- FESTA project
  - [Towards Raising Organizational Awareness](#) – tools for data collection, indicators
  - [Handbook on Resistances to Gender Equality in Academia](#)
- [Achieving Gender Balance at the Top of Scientific Research](#) – participatory gender audit, gender budgeting
- [Practical Guide to Improving Gender Equality in Research Organisations](#) – monitoring (indicators) of gender equality in RPOs and RFOs
- GENDER-NET - [Plans and Initiatives in Selected Research Institutions aiming to stimulate gender equality and enact structural change](#)
- [Aiming to Stimulate Gender Equality and Enact Structural Change](#) – indicators, tools, good practice examples
- [GENOVATE](#) resources



# STANDING WORKING GROUP ON GENDER IN RESEARCH AND INNOVATION

- Advisory body under ERAC, the European Research Area and Innovation Committee, 2017-2021
- Brings together representatives of MS and AC
- More information available <https://era.gv.at/governance/swg-on-gender-in-research-and-innovation/>
- Recent topics
  - Gender Equality Plans
  - Gendered impacts of COVID-19
  - Gender based violence in academia
  - Follow-up report on the Guidance on Targets and Quotas
  - Innovation
  - European Research Area
  - Horizon Europe

# THANK YOU

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