These tips documents are intended for the use of TCD researchers applying to funding calls in the Horizon Europe Framework Programme. Please do not circulate them externally.

Tips documents are unofficial. Always consult the relevant call webpage on the European Commission’s funding & tenders portal. The Guide for Applicants and proposal template will be found under the heading ‘Topic conditions and documents’.

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What’s it all about?

Sex vs gender
Sex refers to the biological and physiological characteristics that define humans as female, male, or intersex. Gender refers to social and cultural factors. Although gender is traditionally described in the binary terms of ‘man’ or ‘woman’, other gender identities exist such as non-binary or agender, along with culture-specific terms such as two-spirit.

‘Gender blind’ versus ‘gender-sensitive’ research
‘Gender blind’ research refers to studies where potential sex and gender difference is not taken into account. Gender-blind research may appear to be unbiased, but it is often based on information derived from male subjects, and/or the assumption that experiences are universal and that all persons have the same needs, regardless of sex or gender.

‘Gender-sensitive’ refers to studies where sex and gender are considered as possible differentials affecting the research, and where the differing needs and social roles of men and women are taken into account. This involves such actions as separating results data by sex and/or gender to study potential disparities; and using participant or user surveys to assess how needs and preferences might differ across the genders.

Gendered innovations
‘Gendered innovation’ is a term used by the European Commission and others to describe the practice of integrating sex and gender issues into research and innovation, with the added value of boosting scientific excellence, inclusivity, and societal relevance.

Intersectionality
Intersectionality refers to the way that multiple social identities overlap in individuals and groups, potentially compounding social disadvantages. For example, in Case Study 3 (below) facial recognition technology misclassifies women more than men and dark-skinned individuals more than light-skinned ones, meaning dark-skinned women are at a particular disadvantage. Researchers should consider how other social factors such as race, nationality, class, disability, and age may affect the needs, outcomes, and experiences of their research participants.

Gender balance in the research team
Applicants to EU funding programmes should ensure that the project team is as gender-balanced as is possible (i.e. a 50/50 balance of male and female researchers). Gender of researchers in the project is recorded in Part A of the proposal (the online administrative forms). While the team’s gender balance will not be assessed as part of the evaluation process, it will be used as a ranking criterion between otherwise equally scored proposals (ex aequo).

Gender in the research project
Gender is a ‘cross-cutting’ issue in Horizon Europe, meaning that it is considered a priority across all pillars and calls. Applicants to HEU programmes should therefore carefully consider the impact of sex and gender in their research design, outlining these considerations in the relevant sections of part B of the proposal template. See below (p. 3) for specific guidelines on where to address this, along with a gender issues checklist.
Why does it matter?

Equality
The EU framework programmes are publicly funded, with the aim of addressing societal challenges across Europe and improving the lives of its citizens. All genders should be represented and equally served by Horizon Europe research.

Safety and wellbeing
A failure to address sex and gender in research can lead not only to social inequality but may pose significant danger to health and wellbeing. In innovation, a failure to consider sex and gender can mean that new products are designed and tested to only fit the needs of one group. The most famous example of this is the practice of creating crash-test dummies to the standard dimensions of a male body. Because safety features are calibrated to the height, weight and physical thresholds of male drivers, women are 47% more likely to be seriously injured in a car accident than men.1 Research into public health during the Covid-19 pandemic has revealed important differences between the sexes, with more men than women dying of acute infection due to a combination of biological and social factors; while women appear to experience more medication side-effects than men.2

Innovation & insights
Considering the possible relevance of sex and gender to research is part of a rigorous scientific method. Gender-sensitive approaches avoid unconscious bias, provide insight into systemic structural barriers, and encourage creativity and innovation.

EU policy
The European Commission intends to implement the following gender equality objectives in research and innovation as part of its strategic plan:

- More women participating in research and innovation programmes
- Better integration of the gender dimension in the content of research & innovation projects
- More participation of EU widening countries in actions dedicated to gender equality in research and innovation organisations
- Broadening gender equality policies in research and innovation to intersections with other potential grounds for discrimination such as ethnicity, disability, and sexual orientation.

There are 3 main levels at which gender equality is considered in Horizon Europe proposals:

- Having a Gender Equality Plan (GEP) in place becomes an eligibility criterion for certain categories of legal entities from EU countries and associated countries
- The integration of the gender dimension into research and innovation content is a requirement by default, an award criterion evaluated under the excellence criterion, unless the topic description explicitly specifies otherwise
- Increasing gender balance throughout the programme is another objective, with a target of 50% women in Horizon Europe related boards, expert groups and evaluation committees, and gender balance among research teams set as a ranking criterion for proposals with the same score.

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Where in the proposal to address it

Before you begin writing the proposal, we suggest making an initial plan using the ‘Gender Dimensions of Research and Innovation Content’ worksheet.

Part A: Administrative Forms

**Gender Equality Plan**

‘Does the organization have a Gender Equality Plan (GEP) covering the elements listed below? Yes/No’

- TCD applicants should tick ‘yes’. TCD’s Gender Action Plan meets the requirements laid out by the EC.

<table>
<thead>
<tr>
<th>Part B: Main Body of Proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Checklist</strong>&lt;sup&gt;4&lt;/sup&gt;</td>
</tr>
<tr>
<td>□ Methodology ensures that (possible) sex/gender differences will be investigated</td>
</tr>
<tr>
<td>□ Sex-/gender-differentiated data will be collected and analysed (where appropriate)</td>
</tr>
<tr>
<td>□ Any questionnaires, surveys, focus groups (etc.) designed to unravel potentially relevant sex/gender differences in data</td>
</tr>
<tr>
<td>□ Groups involved in the project (e.g. samples, testing groups) sex/gender balanced (where feasible)</td>
</tr>
</tbody>
</table>

Where in proposal to address:

1.2 Methodology

‘Describe how the gender dimension (i.e. sex and/or gender analysis) is taken into account in the project’s research and innovation content [e.g. 1 page]. If you do not consider such a gender dimension to be relevant in your project, please provide a justification.’

2.1 Project’s pathways towards impact

‘Provide a narrative explaining how the project’s results are expected to make a difference in terms of impact [including societal impact]’

2.2 Measures to maximise impact

‘Describe the dissemination, exploitation and communication measures that are planned, and the target group(s) addressed.’

3.1 Work plan and resources

‘Detailed work description, i.e.: a list of work packages (table 3.1a); a description of each work package (3.1b); a list of deliverables (3.1c)’

3.2 Capacity of participants and consortium as a whole

‘Describe the consortium. [...] Show how this includes expertise in [...] gender aspects of R&I, as appropriate.’

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<sup>4</sup> Adapted from Toolkit: Gender in EU-funded Research [https://op.europa.eu/en/publication-detail/-/publication/c17a4eba-49ab-40f1-bb7b-bb6faaf8dec8](https://op.europa.eu/en/publication-detail/-/publication/c17a4eba-49ab-40f1-bb7b-bb6faaf8dec8)
Case studies: Gendered Innovations

Introduction
Sex and gender can play an important role in research from many different disciplines. While consideration of sex and gender is more commonly associated with health, social sciences, and the humanities, it can also be highly significant in fields such as engineering, technology, and computer science. Below are case studies demonstrating a wide variety of ‘gendered innovations’ – projects where the due consideration of sex and gender enabled researchers to solve problems and make unique contributions to their field.

Environment: Gendered Innovation in Housing and Neighbourhood Design
Problem: The gendered assumptions of urban planners, architects, and researchers have contributed to unequal access to urban spaces, prioritising the needs of formally employed persons over those of carers and at-home workers (often women). This results in urban spaces being structured for car travel, with shops and amenities placed far away from residential areas.

Research-based solution: Vienna’s Frauen-Werk-Stadt housing development project minimized the distance travelled by carers by incorporating daycare, shops and medical facilities into the residential block and including greater ground-level storage for prams and bikes. Interior workspaces (e.g. kitchens) were designed as ‘cantilevered’ to allow unobstructed views of open areas for the supervision of children at play. For more information, see full case study here: http://genderedinnovations.stanford.edu/case-studies/urban.html

Health: Osteoporosis Research ‘Not Just for Women’
Problem: In the past, osteoporosis has been considered largely as a disease of white, post-menopausal women. However, men account for nearly a third of osteoporosis-related hip fractures in Europe and the U.S, the condition frequently going undiagnosed due to sex, ethnicity, and later age of onset. Outcomes for male sufferers of osteoporosis are frequently worse, both in terms of severity of fractures and mortality risk.

Research-based solution: In order to address the lack of data on male arthritis sufferers, researchers must conduct bone density reference studies on male populations; gender-balance drug trials; and conduct studies on ethnic, geographical, and lifestyle variation as contributing factors.
See: http://genderedinnovations.stanford.edu/case-studies/osteoporosis.html

Technology: Gender and Racial Bias in Facial Recognition
Problem: Facial recognition systems (FRS) are a controversial technology, seen as both a tool for security and a threat to personal freedom and autonomy. In addition to issues around the technology’s regulation and use is its potential to reflect gender and racial biases: many FRS have been found to perform poorly in identifying women, transgender people, and those with darker skin tones. This demonstrates that although we tend to see AI and machine learning as ‘unbiased’ tools, these technologies are only as good as the data they are trained on and can (if poorly designed) contribute to social inequalities.

Research-based solution: To improve the accuracy and fairness of FRS, researchers and those working in the tech sector must create training datasets that are sufficiently large and varied to capture population diversity. They must also work with policy makers to ensure that biometric programs undergo a thorough and transparent civil rights assessment prior to implementation.
See: http://genderedinnovations.stanford.edu/case-studies/facial.html
Resources

Further Information
- WHO Europe on gender
  http://www.euro.who.int/en/health-topics/health-determinants/gender
- European Institute for Gender Equality (EIGE)
  https://eige.europa.eu/
- ‘Horizon Europe Proposals: Addressing Gender Dimensions in Research & Innovation Content’ (Dr Doireann Wallace, TCD Research Development Office)
  https://tcd.cloud.panopto.eu/Panopto/Pages/Viewer.aspx?id=8b7f1748-100d-44bd-989d-ae4b01122a57

Training & Toolkits
- Yellow Window, ‘Gender in EU-Funded Research: Toolkit and Training’
  https://www.yellowwindow.com/genderinresearch
- Canadian Institutes of Health Research, ‘How to Integrate Sex and Gender into Research’
  http://www.cihr-irsc.gc.ca/e/50836.html
- GARCIA: Toolkit for Integrating Gender-Sensitive Approach into Research and Teaching
- EIGE Gender Equality in Academia and Research (GEAR) Tool
  https://eige.europa.eu/gender-mainstreaming/toolkits/gear

Case studies
- Stanford.edu Gendered Innovations
  http://genderedinnovations.stanford.edu/what-is-gendered-innovations.html
- Gendered Innovations: How inclusive analysis contributes to research and innovation

Policy
- EU Gender Equality Strategy 2020-25
- H2020 Expert Group to update and expand ‘Gendered Innovations/ Innovation through Gender’
  https://ec.europa.eu/transparency/expert-groups-register/screen/expert-groups/consult?do=groupDetail.groupDetail&groupId=3601&NewSearch=1&NewSearch=1