Comparative analysis of existing national initiatives on the integration of the gender dimension in research contents
Acknowledgments

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The subject of the integration of the gender dimension in research contents is covered as one of the main ERA priorities within the “Gender Equality and Gender mainstreaming in research” priority. The quality of science, research and innovation depends on the research community’s ability to be responsive to the needs of society as a whole and it has been proved that integrating the gender dimension in research and innovation (R&I) content helps improve the scientific quality and societal relevance of the produced knowledge, technology and/or innovation.

Gender dimension in research means integrating sex and gender analysis into all phases of basic and applied research—from setting priorities, to funding decisions, to establishing project objectives and methodologies, to data gathering, analysing results, and evaluation. And incorporating the gender dimension in research content refers to the use of sex- and/or gender-based analysis in all the phases of the research cycle, so that research content and impact reflect the realities, needs and expectations of both the women and the men.

As it is stated in the ERA Progress Report, the lack of a gender dimension in research programmes remains a common challenge. There is a need for more efforts and systemic strategy aiming at longer term institutional change in the European research system.

Today, many research institutions in Europe have long been developing gender studies in various fields of the social sciences and humanities (SSH). And yet, few national programmes, agencies or research institutions have initiatives to promote the integration of the gender dimension in non-SSH fields research, although it is a cross-cutting factor in Horizon 2020, the EU framework programme for research and innovation (2014-2020), and is becoming a requirement for more and more journals.

The present “Comparative analysis of existing national initiatives on the integration of the gender dimension in research contents” examines the information collected by the “Compendium of existing national and regional initiatives on the integration of the gender dimension in research contents” as a result of a survey launched in July 2014 by GENDER-NET. The core objective of the survey was to identify and analyse common approaches and areas of development on initiatives to facilitate the integration of the gender dimension in research contents within national organisations in the framework of their national programmes. The main areas of the survey were: Policies and Strategies aimed at integrating sex/gender analysis in research (P/S), Research Funding Programmes aimed at integrating sex/gender analysis in research (RFPs), Guidelines and Training materials for Applicants (GTAs), Guidelines/Training for grant proposal Reviewers (GTRs),

1 Source: http://genderedinnovations.stanford.edu/terms/dimension.html
2 ERA Progress Report 2014 (pag. 6)
Recommendations and/or Models for University Curricula Development in scientific and technological fields (RMUCD), Transnational Activities (TAs) and Other Activities (OAs).

40 national-level organisations responded to the survey and the data and information collected was compiled and analysed to feed into the present comparative analysis report. Although the coverage can be perceived as limited, the survey and the report cover all the major players in the field, many of which are stakeholders in GENDER-NET.

Based on the information provided, half of the responding organisations (22) can be defined as relatively inactive organisations having reported no activity at national level in any of the main survey areas covering the integration of the gender dimension in their research programmes. The remaining half of the responding organisations can be characterized as ranging from relatively active to proactive organisations. The gap in terms of implemented policies and measures between the proactive and inactive organisations is wide and causes significant differences among peer organisations. The core of proactive organisations has already implemented significant measures and their experience is fundamental to supporting other organisations in their endeavour to promote the integration of the gender dimension in research contents.

One of the main conclusions drawn from the analysis is that there seems to be no homogeneity on the level of proactivity of organisations, neither within countries nor among types of organisations.

The present report also concludes that the level of implementation follows a descending trend from P/S (40% of the sample), RFPs (28%), GTAs (28%), GTRs (15%) to RCMUCDs (3%), which indicates different stages in the implementation process.

Successes, promising practices and case studies that were collected through the survey and compiled in the Compendium, were selected according to transferability potentialities, and are presented to provide valuable lessons and insights into (new) ways of integrating gender perspectives into research contents.

Having analysed the specific challenges that organizations face when integrating the gender dimension in the contents of research in their national programmes, the following areas were acknowledged by organizations as barriers: lack of high level support; different level of resistances; lack of awareness, expertise, or organizational competence; and confusion between gender balance/gender equality policies and gender in research contents.

Finally, in order to support organizations approaching these challenges and barriers, a set of recommendations are proposed to further advance at
national and transnational levels. Among these recommendations the following are stressed:

A great effort should be put in place to avoid the common confusion between gender balance/gender equality policies and the gender dimension in research contents. For that purpose, it is essential to provide clear definitions and examples of the gender dimension in research contents when talking about sex/gender analysis, gender in research and gender approach.

The adoption of a specific policy or strategy within the institution aimed at integrating the gender dimension in research content and the implementation of a legal framework can help in giving the legitimate support to develop the implementation of policies or strategies, to develop further measures, and to allocate the financial means to do so.

High level support is crucial for the development and implementation of such a policy/strategy. One can go as high as legislators for establishing a legal framework, but clear support of the leadership at institutional level is key, particularly in showing that enforcing such integration is in no way limiting freedom of research but actually promoting better research quality and widening innovation potentialities.

Additionally, where a policy/strategy is in place, the necessary budget and resources should be allocated for a sound implementation followed by a comprehensive monitoring and evaluation system to measure the success of the implemented policies.

The present report provides also other recommendations towards the integration of the gender dimension in university curricula, research funding programmes, and development and implementation of guidelines and training for applicants to grants and reviewers of project proposals.
The present report is a deliverable of the GENDER-NET ERA-NET, funded by the European Commission under the 7th Framework programme (Science-in-Society work programme).

GENDER-NET is a pilot transnational research policy initiative (a European Research Area Network) designed to address the common challenges still facing European research institutions in achieving gender equality and gender mainstreaming in research and innovation. These challenges concern the persistent barriers and constraints to the recruitment, advancement and mobility of women in the European scientific system, the lack of women in decision-making, but also the limited integration of the gender dimension in research programmes and contents. The present report focuses on this latter aspect.

GENDER-NET brings together a balanced partnership of 12 national research programme owners from across Europe and North America (i.e. ministries, national research funding agencies and research performing organisations, and other types of national organisations – see consortium members on page 2) as well as a number of Observer organisations (6 national organisations as of June 2015) and an Expert Advisory Board, all with a shared commitment to gender equality and synergistic expertise in gender and science issues.

This D3.10 report is part of the outcomes of Work Package 3 entitled: “Gendering Research Contents and Programmes”. It provides an overview of existing national/regional policies and programmes, as well as related implementation tools, addressing the integration of sex and gender analysis in national-level research and innovation funding and/or performing organisations in Europe and Northern-America.

The data analysed in this report were collected by means of a comprehensive online survey launched in the course of 2014 that was sent to ministries, national research funding agencies and research performing organisations as well as other private organisations located in the Member States and Associated Countries participating in GENDER-NET as well as in other relevant countries. In total, 40 such organisations from 22 countries responded. The information collected was then synthesised into a Compendium of existing national and regional policies and programmes.

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3 Detailed information on GENDER-NET is available on the project’s website: http://www.gender-net.eu

4 As of the General Assembly of August 30th 2015, there are now 2 new late-entry Beneficiaries and 4 new Observers in the GENDER-NET consortium. These are: 1) Beneficiaries: Science Foundation Ireland (SFI) and the Ministry of Science, Technology & Space of the State of Israel (MOST); 2) Observers: NordForsk, the Technology Agency of the Czech Republic, the Icelandic Ministry of Education, Science and Culture, and the US National Science Foundation.
regional initiatives on the integration of the gender dimension in research contents including country and institution fact sheets (GENDER-NET Deliverable 3.9).

The present report (Deliverable 3.10) consists of a comparative analysis of the data presented in the Compendium. It is expected to be the GENDER-NET’s core reference document for developing common criteria, guidelines, recognition schemes, and other implementing tools. Particularly, it will be useful for the last two subsequent WP3 GENDER-NET reports: D3.11, aimed at assisting national/regional research funding organisations/agencies with the know-how to in-tegrate sex and gender considerations into policies, programmes, plans and strategies, and to raise awareness about the importance of sex and gender in research and innovation; and D3.12 aimed at identifying the core elements of a framework for implementing transnational strategic activities and monitoring of common indicators.

On 26 and 27 February 2015, an expert workshop (Milestone MS8) was organised to kick-start the comparative analysis of the data and feed into the present report, which is structured into 6 different sections.

In section 2, common threads at national and regional levels are described, and the survey results are analysed according to the type of organisation and proactivity level across the main survey areas. In terms of proactivity, a three level categorisation of the respondent organisations is proposed.

Section 3 lists the successes and promising practices that were collected through the survey. They were selected according to transferability potentials and provide valuable lessons and insights into (new) ways of integrating gender perspectives into research contents.

Section 4 highlights the barriers and challenges that were identified by the respondents. It is of upmost importance to understand what challenges and barriers exist in order to tackle these efficiently.

In section 5, three full case studies are provided from the respondent organisations which have been selected for being good examples at the general objective of integrating the gender dimension in their own research funding systems.

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5 The contents of the Compendium (D3.9) will be made readily available online on the GENDER-NET website, including through an interactive map offering an easy access to the complete organisations’ fact sheets, per country. It must be noted that one of the respondent organisations (NIH, USA) did not answer the survey in the online format but rather provided information through e-mail, and therefore it is included as an exception in the Compendium. But, given it is a good case study due to its important initiatives and measures in areas which are not found in the other respondent organisations, it has been included for the comparative analysis at the same level as the other 39 ones.
Finally, section 6 presents the main conclusions of the analysis, together with specific conclusions per main survey area: 1) Policies and strategies aimed at integrating sex/gender analysis in research, 2) Research-funding programmes aimed at integrating sex/gender analysis in research, 3) Guidelines and training materials for applicants, 4) Guidelines/Training for grant proposal reviewers, 5) Recommendations and/or models for university curricula development in scientific and technological fields,

The present report prepared by MINECO and FNRS as task leaders, was reviewed by CNRS (GENDER-NET Coordinator), CIHR (WP3 co-leader with MINECO) and by other GENDER-NET participants (HEA/IRC, RCN, CRUS, RPF, FWF).

1.2 Definitions and Concepts

Sex is a biological quality or classification of sexually-reproducing organisms, generally female, male, and/or intersex, according to functions that derive from the chromosomal complement, reproductive organs, or specific hormones or environmental factors that affect the expression of phenotypic traits that are strongly associated with females or males within a given species. Hormonal (and environmental) effects, which may be organizational (differentiating) and essentially permanent, or activational, thus possibly reversible, are strongly influenced by the genetic make-up of the individual (Wallen, 2009).6

Gender – a socio-cultural process—refers to cultural and social attitudes that together shape and sanction “feminine” and “masculine” behaviours, products, technologies, environments, and knowledges. “Feminine” and “masculine” describe attitudes and behaviours on a continuum of gender identities. Gender does not necessarily match sex.7

Equality between women and men (Gender Equality): refers to the equal rights, responsibilities and opportunities of women and men and girls and boys. Equality does not mean that women and men will become the same but that women’s and men’s rights, responsibilities and opportunities will not depend on whether they are born male or female. Gender equality implies that the interests, needs and priorities of both women and men are taken into consideration, recognizing the diversity of different groups of women and men. Gender equality is not a women’s issue but should concern and fully engage men as well as women. Equality between women and men is seen both as a human rights issue and as a precondition for, and indicator of, sustainable people-centered development.8

6 Source: http://ec.europa.eu/research/swafs/gendered-innovations/index_en.cfm?pg=home
7 Source: http://genderedinnovations.stanford.edu/terms/gender.html
8 Source: UN Women, available at Concepts and Definitions
Gender Mainstreaming: is a globally accepted strategy for promoting gender equality. Mainstreaming is not an end in itself but a strategy, an approach, a means to achieve the goal of gender equality. Mainstreaming involves ensuring that gender perspectives and attention to the goal of gender equality are central to all activities - policy development, research, advocacy/dialogue, legislation, resource allocation, and planning, implementation and monitoring of programmes and projects.9

Sex/gender analysis: is an umbrella term for the entire research cycle that includes the integration of sex/gender issues from the setting of the research priorities through developing methodologies, gathering and analysing data to evaluating and reporting results and transferring them to markets.10

Gender dimension in research means integrating sex and gender analysis into all phases of basic and applied research—from setting priorities, to funding decisions, to establishing project objectives and methodologies, to data gathering, analyzing results, and evaluation.11 In fact, gender dimension means integrating sex and gender analysis into research.

Sex and Gender intersecting factors: Sex and gender also intersect in important ways with a variety of other factors. These factors or variables can be biological, socio-cultural, or psychological aspects of users, customers, experimental subjects, or cells. These factors include but are not limited to age, socioeconomic status, ethnicity, geographical location, etc.12

Methods for Sex and Gender Analysis are described as follows: Sex and gender can influence all stages of research or development processes, from strategic considerations for establishing priorities and building theory to more routine tasks of formulating questions, designing methodologies, and interpreting data. Many pitfalls can be avoided—and new ideas or opportunities identified—by designing sex and gender analysis into research from the start. Sex and gender analysis work alongside other methodologies in a field to provide yet further “controls” (or filters for bias) providing critical rigor in science, medicine, and engineering research, policy, and practice.13

Integrating Gender Analysis into Research (IGAR, also known as “incorporating the gender dimension into research content”) refers to the use of sex- and/or gender-based analysis in all the phases of the research cycle. In some projects

9 Source: UN Women, available at Gender Mainstreaming
11 Source: http://genderedinnovations.stanford.edu/terms/dimension.html
12 Source: http://genderedinnovations.stanford.edu/methods/factors.html
only a sex analysis is relevant to the research problem (e.g. preclinical studies on cells and tissues, and in animals in many cases, given that an over-reliance on male animals, and neglect of attention to the sex of cells, can lead to neglect of key sex differences that should be guiding clinical studies, and ultimately, clinical practice\textsuperscript{14}). In some other cases, only a gender analysis is necessary (mainly in studies where biological differences do not play a role). Gender inequalities, however, are based in the structural gendered division of labour and power and are crucial to understand and take into account the different interests, needs, behaviours, roles, stereotypes, constraints, etc. of women and men regarding their access to resources, power, positions, activities, etc. Study results may then affect the social and economic relationships between these groups, for instance, reduce the existing gender inequalities by means of developing new tools aimed to detect and prevent gender-based violence. And in other cases, both sex and gender interact in a particular study. In some instances sex and gender cannot be distinguished, as for example in studies of nutrition or exercise, where hormonal, physiological, and cultural factors can influence the likelihood of disease\textsuperscript{15}. Therefore, as a concept, ‘IGAR’ also covers the inclusion of sex analysis (not only gender), and is used as such in the present report.

**Gender-sensitive research** takes into account the differences between men and women in all aspects of the research, from an initial idea, formulating research questions, objectives and methodologies to the outcomes and presentation of results. Apart from integrating gender into the content, gender-sensitive approach strives to provide equal participation of both women and men in scientific work. Gender-sensitive approach takes into account transgender and transsexual population as well.\textsuperscript{16}

**Gender blind research** does not account for the differences between men and women. It can ignore or misuse the existence of gender differences to pursue research outcomes. It overlooks women’s groups and interests and reinforces unequal power relations\textsuperscript{17}. Gender-blind research does not take gender into account, being

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\textsuperscript{14} Source: NIH Takes Steps to Address Sex Differences in Preclinical Research

\textsuperscript{15} Source: LERU (2015). Gender and sex matter in research: Twenty recommendations from Europe’s research universities. For instance, traditional gender attitudes towards beauty and body image have biased research on eating disorders. This research field has only recently come to focus on male experience. A paper by Chengyuan Zhang (2014) tracks the evolution of approaches to anorexia nervosa in men since 1873. The study by Ulla Räisänen & Kate Hunt (2014) has showed that the widespread perception of Eating Disorders (EDs) as uniquely or predominantly a female problem led to an initial failure by young men to recognise their behaviours as symptoms of an ED.

\textsuperscript{16} Source: Toolkit for Integrating Gender-Sensitive Approach into Research and Teaching (GARCIA Working Papers 6, 2015, p.4)

\textsuperscript{17} Source: Integrating Gender into Forestry Research (Center for International Forestry Research, 2012, p.48)
based on the often incorrect assumption that possible differences between men and women are not relevant for the research at hand.\textsuperscript{18}

**Gender aware research** demonstrates knowledge of women’s and men’s needs, interests and assets. It collects sex disaggregated data however, the research does not set out to analyse the underlying inequalities between men and women.\textsuperscript{19}

**Gender transformative research** accounts for gender differences and inequalities from the start and designs a sound research plan to address these differences. It sets out to transform the relationships between men and women that produce inequalities.\textsuperscript{20}

**Gender-specific research**: Gender-specific research focuses on gender itself as a subject matter.\textsuperscript{21} It is increasingly more usual to describe the field of study to which gender and gender relations are central as “gender studies” rather than “women’s studies”, which reflects an historical, chronological shift as well as intellectual connections and the growth of empirical research in the field. Although gender studies are relatively recent in the academy, most work in this area builds upon the growth of the women’s movement as part of the identity politics of the 1970s and 1980s and the development of Women’s Studies Centres in North American, Australian and European countries. All these centres were characterized by emancipatory aspirations that sought to provide robust empirical evidence and scholarly bases for political change, in particular by putting gender, and [...] women onto the political agenda and into discourse.\textsuperscript{22} It is also related to the term “feminist studies”. Feminist studies, especially feminist theories, remain central to the [gender studies] field, although gender studies, like women’s studies are marked by diverse, and sometimes overlapping intellectual traditions and movements [...] The shift towards gender studies also reflects a widening intellectual base, to include, among others, critical studies of masculinity, LGBTQ (lesbian, gay, bisexual, trans, queer) studies, ecological feminism, techno-science studies, etc.\textsuperscript{23}

### 1.3 Rationale: Scientific excellence and beyond

Before diving into the analysis of the data it is important to consider the rationale behind this initiative of mapping and analysing relevant policies and strategies aimed at integrating sex/gender analysis in research.

\textsuperscript{18} Source: Toolkit - Gender in EU-funded research (EC, 2009). Part 1.2

\textsuperscript{19} Source: Integrating Gender into Forestry Research (Center for International Forestry Research, 2012, p.48)

\textsuperscript{20} Ibid

\textsuperscript{21} Source: Toolkit - Gender in EU-funded research (EC, 2009). Part 1.2


\textsuperscript{23} Ibid
GENDER-NET has provided a clear rationale and points to the fact that gender research has shed light on the existing inequalities between men and women in science and in different areas of society and demonstrated the existence of a global and structural system that produces inequalities and a hierarchical organisation between men and women, including in higher education and research institutions.

Years of action and research have also showed that the quality of science, research and innovation depends on the research community's ability to be responsive to the needs of society as a whole. A precondition to meet this challenge is not only that the science community recruits and retains among the best people – including women – but also that its research content and impact reflect the realities, needs and expectations of both the women and the men.

Today, many research institutions in Europe have long been developing gender studies in various fields of the social sciences and humanities (SSH). And yet, few national programmes, agencies or research institutions fund actual research projects promoting the integration of the gender perspective in non-SSH fields, although it is becoming a requirement for more and more journals and a cross-cutting factor in Horizon 2020, the EU framework programme for research and innovation (2014-2020).

Not including the gender dimension into the methodology, content and impact assessment of research can lead to poor science and missed opportunities. Gender in research ensures “that any assumptions made or issues addressed are based on the best available evidence and information”. 24 Also, it ensures that “the concepts and theories adopted do not blind researchers to important aspects of sex and gender that could be a fertile source for innovation.” 25 The latter argument is for the development of an innovation European Research Area (ERA) in a global context.

One of the priorities of the ERA is precisely “gender equality and gender mainstreaming in research”. Through its activities, the GENDER-NET project aims to contribute to achieving this priority of the ERA.” 26

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24 Quoted from Genereed Innovations: https://genderedinnovations.stanford.edu/methods/concepts.html

25 Source: Idem

2. Comparative Section

As part of GENDER-NET WP3 Task 2, a survey questionnaire was designed with the objectives to: a) capture successful national and regional policies, programmes, plans and strategies that facilitate the integration of sex and gender analysis into research – especially outside humanities and social sciences – and that could be tailored within transnational contexts and implemented across countries; and b) identify gaps for which the GENDER-NET project could provide support.

The survey was launched mid-July 2014. The target population and the methodology used for distributing the survey questionnaire were as follows:

- All GENDER-NET WP3 national-level participants were required to fill in the online survey, and were also asked to invite other relevant national- and regional-level organisations in their respective countries to fill in as well.
- All Science Europe member organisations (50 research-funding and/or research-performing organisations from 27 countries in Europe, see: [http://www.scienceeurope.org/about-us/member-organisations](http://www.scienceeurope.org/about-us/member-organisations)) were invited by Science Europe to fill in the survey.
- Members of the Helsinki Group on Gender in Research and Innovation representing national organisations (e.g. ministries) were invited to fill in the survey as well. The Helsinki Group, established in 1999 as an Advisory Group to the European Commission, brings together representatives from Member States and Associated Countries with a mandate to promote equality between women and men in R&I and also to embed the gender dimension in science, research and innovation contents and programmes.
- Relevant member organisations of TAFTIE, the European Network of Innovation Agencies (see: [http://www.taftie.org/members](http://www.taftie.org/members)), were also invited to fill in the GENDER-NET WP3 survey.

The results of the survey and follow-up data collected informed the *Compendium of existing national and regional initiatives regarding the integration of the gender dimension in research contents (D.3.9)*. In this section the information compiled in the Compendium is analysed in order to identify common approaches and areas of development on initiatives to facilitate the integration of the gender dimension into research contents by the respective organisations in the framework of their national programmes.

40 national-level organisations responded to the survey and the data and information collected was compiled to feed into the above-mentioned compendium and for the present comparative analysis. These 40 respondent organisations come from 22 countries (20 European countries, Canada and USA). From the GENDER-NET Consortium, there are 20 organisations (as of June 2015), i.e. 11 out of the 12 Beneficiaries as well as 3 associated organisations, 4 Observers and 2 organisations represented via the GENDER-NET Expert Advisory Board.
However, a comparative analysis by regional context within Europe could not be properly conducted in the present report due to the fact that, despite the wide-ranging strategy used for disseminating the online survey, there is no homogeneous representation of all the European regional contexts among the 40 respondent organisations. The final sample from the survey lacks a solid representation of countries from the South of Europe (the only southern country which responded to the survey is Spain, with two organisations, MINECO and CSIC). Although there are two non-European countries participating in the study, Canada (CIHR) and USA (NIH; NAS), these key examples are not sufficient to undertake an in depth analysis of the North American context providing a suitable comparative analysis to the European context.

It must also be noted that the responses to the survey show that national organisations are not homogeneous on their integration of the gender dimension in research contents within the same country. Therefore, it is not convenient to take the country as the unit of analysis.

For these reasons, the present comparative analysis is conducted at an organisational level. The 40 respondent organisations are analysed and compared following two main dimensions: i) type of organisation (ministry, research funding organisation, research performing organisation, etc.); and, ii) the proactivity level on the integration of the gender dimension in research contents regarding the implementation of the measures represented by the 5 main survey areas:

a) Policies and Strategies aimed at integrating sex/gender analysis in research (P/S)

b) Research Funding Programmes aimed at integrating sex/gender analysis in research (RFPs)

c) Guidelines and Training materials for Applicants (GTAs)

d) Guidelines/Training for grant proposal Reviewers (GTRs)

e) Recommendations and/or Models for University Curricula Development in scientific and technological fields (RMUCD)

In total, 40 national organisations responded to the GENDER-NET invitation to fill in the survey questionnaire. The present comparative analysis provides a grouping of 5 types of organisations as follows:

a) Ministries

b) Research Funding organisations (RFOs)

c) Research Performing Organisations (RPOs)

d) Research Funding and Performing Organisations (RFO/RPOs)

e) Others
The category RFO/RPOs used in the present analysis for the two organisations that are both funding and performing research was not considered as such in the above mentioned Compendium, where these organisations were counted in both the separate categories, RFO and RPO, as they were in the survey. For the purposes of the present analysis it is important to include them in this new specific category both because they show common approaches and because it is a way to avoid discrepancies when calculating percentages of responses.

a) There were 8 respondent Ministries (20% out of the total sample):  
- Federal Ministry of Science, Research and Economy (BMWF), Austria  
- State Secretariat for Research, Development and Innovation in the Ministry of Economy and Competitiveness (MINECO-SEIDI), Spain  
- Ministry of Education, Culture and Science (MOCW), The Netherlands  
- State Secretariat for Education, Research and Innovation (WBF-SERI), Switzerland  
- Ministry of Education, Youth and Sports (MSMT), Czech Republic  
- Ministry of National Education, Higher Education and Research (MENESR), France  
- Ministry of Education and Science of the Republic of Lithuania (SMM) Lithuania  
- Ministry of Education, Science and Sport (MESS) Slovenia

b) There were 23 respondent Research Funding Organisations (58% out of the total sample) from 20 countries. 21 out of them from European countries and 2 of them from Canada:  
- Austria: Austrian Science Fund (FWF) and Austrian Research Promotion Agency (FFG)  
- Canada: Canadian Institutes of Health Research (CIHR) and the Natural Sciences and Engineering Research Council of Canada (NSERC)  
- Ireland: Irish Research Council (IRC), Health Research Board (HRB), Higher Education Authority (HEA) and Science Foundation Ireland (SFI)  
- Netherlands: Netherlands Organisation for Scientific Research (NWO) and Organisation for Health Research and Development (ZonMw)  
- Norway: Research Council of Norway (RCN)  
- Belgium: Fund for Scientific Research (F.R.S. - FNRS)  
- Switzerland: Swiss National Science Foundation (SNSF)

27 Organisations marked in bold are full or associated members of the GENDER-NET Consortium.
Cyprus: Research Promotion Foundation (RPF)

Germany: German Research Foundation (DFG)

Denmark: Danish Council of Independent Research (DFF) and Danish National Research Foundation (DNRF)

Finland: Academy of Finland (AKA)

France: Agence Nationale de la Recherche (ANR)

Hungary: Hungarian Scientific Research Fund (OTKA)

Latvia: Latvian Council of Science (LSC)

Sweden: Swedish Research Council (SRC)

United Kingdom: Research Councils UK (RCUK)

c) There were also 2 RFO/RPOs (5% out of the total sample):

France: Centre National de la Recherche Scientifique (CNRS)

USA: US National Institutes of Health (NIH)

d) Only 4 national RPOs responded to the survey (10% out of the total sample):

Germany: Leibniz Institute for the Social Sciences (GESIS)

Spain: Centro Superior de Investigaciones Científicas (CSIC)

Cyprus: State General Laboratory (SGL)

Slovakia: Institute for Sociology of the Slovak Academy of Sciences (U-SAV)

e) And finally, 3 respondent organisations were included in the “Others” category (7, 5% out of the total sample):

Norway: National Public Information Centre (KILDEN)\(^28\)

Switzerland: Rector’s Conference of the Swiss Universities (CRUS)

US National Academies (NAS)

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\(^28\) KILDEN is an affiliated sub-unit funded by RCN, however KILDEN has professional autonomy. It is an operational “tool” to disseminate, support – and increase knowledge of gender research. This fact is not considered in the description and analysis of RCN’s achievements, since RCN and KILDEN are treated as two separate units in the present report, following the same pattern as in the survey and Compendium (D.3.9)
Table 1. Types of organisations and main survey areas

<table>
<thead>
<tr>
<th></th>
<th>P/S</th>
<th>RFPs</th>
<th>GTAs</th>
<th>GTRs</th>
<th>RMUCD</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 Ministry</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>50%</td>
<td>38%</td>
<td>25%</td>
<td>25%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>23 RFO</td>
<td>7</td>
<td>6</td>
<td>6</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>30%</td>
<td>26%</td>
<td>26%</td>
<td>17%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>2 RFO/RPO</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>4 RPO</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>25%</td>
<td>50%</td>
<td>25%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>3 Other</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>67%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>40 TOTAL</td>
<td>16</td>
<td>13</td>
<td>11</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>40%</td>
<td>33%</td>
<td>28%</td>
<td>15%</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

As it is shown in Table 1, the ministries seem to be active in all main areas except in the area of Recommendations for Curricula Development at Universities, but above all, they report having policies/strategies in place. In regards to the RFOs, there are also examples that cover all areas, nearly a third have P/S, one quarter has Research Funding Programmes and Guidelines/Training for Applicants and less than a fifth have Guidelines/Training for Reviewers.

The RFOs/RPOs, although poorly represented (just 2 out of the total sample), have P/S, RFPs and GTAs but do not have GTRs or RMUCD.

In the case of the RPOs, half of them (though only 4 in the whole sample) have Research Funding Programmes, a quarter have P/S and another quarter have also GTAs.

From the “Others” category of organisations (a National Academy, a National Information Centre and a Rectors’ Conference), two have P/S and only one of them has RMUCD.

From the data provided by the organisations we can conclude that regarding the implementation of measures in the 5 main survey areas, ministries and RFOs follow almost the same pattern as the total sample. More detailed information about which specific respondent organisations are developing such measures (and about the particular measures reported by them), is presented in the following sections of the present report.
In the present section, the respondent organisations are categorized according to their proactivity level in implementing policies, strategies or incentives aimed at integrating the gender dimension into their research (funding) programmes. Two categories of countries with respect to this dimension of analysis have already been used in two previous EC reports on gender and research, *The Gender Challenge in Research Funding. Assessing the European National Scenes (2009)* and *Gender Equality Policies in Public Research (2014)*:

“proactive countries, which promote and monitor gender in research contents in research funding with active policies and measures, and countries relatively inactive in this area, with few, if any, initiatives” (EC, 2009, p.4).

However, for the purpose of the present analysis, it has been found more precise to expand these two main categories in order to include one additional category – i.e. relatively active organisations – that could better define the respondent organisations that are neither fully proactive nor relatively inactive. Therefore, from the point of view of their proactivity in this topic, the respondent organisations have been divided into three different groups as follows:

a. Proactive Organisations (group 1)
This group includes the respondent organisations whose input cover at least 3 of the 5 main areas surveyed and who, according to their responses, are promoting and monitoring gender in research contents by means of concrete policies and measures.

b. Relatively Active Organisations (group 2)
The institutions included in this second group are organisations which are active only in 1 or 2 of the 5 main areas in the survey. These are organisations that, according to their responses, cannot be considered as proactive as the former category but still have some measures/initiatives at national level towards the integration for the gender dimension in research contents.

c. Relatively Inactive Organisations (group 3)
This group of organisations are those who have reported no activity at national level in any of the 5 main survey areas. However, some of the respondent organisations within this group are involved in Transnational Activities (TAs), such as GENDER-NET, or in Other related Activities (OAs). These organisations have

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29 As a result of the work of an expert group entitled *Gender and Excellence*, set up by the European Commission
30 A report by Anke Lipinsky, based on a survey among the members of the Helsinki Group on Gender in Research and Innovation (HG)
very few or no initiatives for promoting the integration of the gender dimension in research contents.

2.2.1 Proactive Organisations

The following 9 organisations (22.5% of all the organisations presented in the compendium) can be categorized as proactive:

- **2 Ministries**: BMWFW (AT) and MINECO (ES)
- **5 RFOs**: FWF, FFG (AT); IRC (EI); CIHR (CA) and ZonMw (NL)
- **2 RFO/RPOs**: CNRS (FR) and NIH (US)

As shown in table 1 below, all of these organisations have initiatives in the first 3 main areas of the survey (Policies and Strategies, Research Funding Programmes and Guidelines and Training materials for Applicants). Additionally, some of them also have initiatives in the fourth main area (Guidelines/Training for Grant Proposal Reviewers).

Regarding the fifth area (Recommendations and/or Models for University Curricula Development), the responses show that none of the organisations assigned to this proactive group have initiatives oriented to develop such models or recommendations, the main reason being that they, as national-level organisations, do not have responsibility for university-level curricula development.

<table>
<thead>
<tr>
<th>Country</th>
<th>ORG.</th>
<th>Type of ORG.</th>
<th>P/S</th>
<th>RFPs</th>
<th>GTAs</th>
<th>GTRs</th>
<th>RUNC</th>
<th>TA</th>
<th>OAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>CIHR</td>
<td>RFO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>AT</td>
<td>FFG</td>
<td>RFO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>AT</td>
<td>FWF</td>
<td>RFO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>AT</td>
<td>BMWFW</td>
<td>Ministry</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>ES</td>
<td>MINECO</td>
<td>Ministry</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IE</td>
<td>IRC</td>
<td>RFO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FR</td>
<td>CNRS</td>
<td>RFO/RPO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>NL</td>
<td>ZonMw</td>
<td>RFO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>US</td>
<td>NIH</td>
<td>RFO/RPO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Therefore, 100% of these organisations have a Policy or Strategy aimed at integrating the gender dimension into research contents, 100% of them own
Research Funding Programmes aimed at the integration of gender in research contents and develop Guidelines/Training materials for Applicants, and 67% (all of them except ZonMw and CNRS) have Guidelines/Training for Grant Proposal Reviewers.

89% of them participate in Transnational Activities (TAs) aimed at fostering the integration of sex/gender analysis into research contents/projects/programmes and 44% participate in Other Activities (OAs).

Within this category there are 9 organisations (23% of the sample) which responded affirmatively only to 1 or 2 of the 5 main survey areas. Different types of organisations are included in this group:

- **2 Ministries**: WBF-SERI (CH), MOCW (NL)
- **3 RFO**: RCN (NO), SNF (CH), HRB (IE)
- **2 RPO**: GESIS (DE), CSIC (ES)
- **2 other**: NAS (US), KILDEN (NO)

As shown in table 2 below, 7 out of these organisations have policies and strategies (78%) the exception being GESIS, and HRB. Only 2 have research funding programmes (20%, RCN$^{31}$ and WBF-SERI); only 2 of them (20%) have training for applicants: HRB (IE) & GESIS (DE); none has training for reviewers and none has recommendations for university-level curricula development.

In all these organisations (group 2), although there are in most cases policies/strategies towards the integration of the gender dimension, it seems that there is less proactivity to effectively implement the policy/strategy to broader levels, and less initiatives or measures have been put in place.

None of these organisations have initiatives towards the training for reviewers, and only 2 out of them mention having trainings for applicants: HRB (IE) and GESIS (DE).

Lastly, the 89% of group 2 respondents participate in Transnational Activities (TAs) aimed at fostering the integration of sex/gender analysis into research contents/projects/programmes and half of them (56%) participate in Other Activities (OAs).

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$^{31}$ RCN did run specific programmes for gender research in SSH until 2012. They are now in the process of developing methods of mainstreaming
2.2.3 Relatively Inactive Organisations

The rest of the organisations (22) covered by the survey (55%) are relatively inactive because they declared having no measures in any of the 5 main areas towards the integration of the gender dimension in research contents. Among these organisations there are:

- 4 Ministries: MSMT (CZ), MENESR (FR), SMM (LT), MESS (SI)
- 15 RFO: HEA (IE), SFI (IE), NSERC (CA), RPF (CY), DFG (DE), DFF (DK), DNRF (DK), AKA (FI), ANR (FR), OTKA, (HU), LSC (LV), NOW (NL), SRC (SE), RCUK (UK) and FNRS (BE)
- 2 RPO: SGL (CY), SU-SAV (SK)
- 1 Other: A Private Association, CRUS (CH)

However, 73% of them report that they have undertaken at least one activity in a transnational context (TAs) and 32% participate in Other Activities (OAs). Particularly, 8 out of them are members of the Science Europe Working Group on Gender & Diversity, and 2 out of them are represented on the Helsinki Group on Gender in Research and Innovation (HG): MSMT (CZ) and SMM (LT).
When comparisons are made by type of organisations and proactivity level, results show that there is no consistent relation between these two dimensions. Only the two organisations that are both Research Funding and Performing, show a homogeneous pattern regarding their proactivity level, given that they are both included in the Proactive Group (see Table 4 below).

As commented before, there are 8 ministries in the total sample. Only two (25%) of these ministries (BMWF, MINECO) can be included in the group of proactive organisations. Another 25% of them, WBF-SERI and MOCW, are in Group 2 (relatively active organisations). The first of these (WBF-SERI) is categorised as
such because it covers 2 main areas from the survey (P/S and RFPs), and the second (MOCW) because it only covers one main area (P/S). The remaining 4 ministries (50%) are part of the relatively inactive group. None of the ministries have measures towards developing recommendations for curricula development at university level, due to the fact that they do not have responsibility on this matter (apart from some accreditation schemes in certain countries).

22% of RFOs (5) are included in the proactive category (Group 1), 3 out the 23 RFOs (13%) are in the relatively active category (Group 2) and the rest, 65% of the RFOs have very few or no initiatives on the promotion of the integration of the gender dimension in research contents (group 3 relatively inactive organisations).

There are 4 Research Performing Organisations, 2 in the group of relatively active organisations (GESIS and CSIC). The first is included in this group due to the fact that it covers the third main area of the survey, i.e. having Guidelines and Training for Applicants on the integration of sex/gender analysis in research design, and CSIC because it covers the first area of the survey, i.e. having a policy/strategy aimed at integrating sex/gender analysis in research. The latter being a national legislation (the Spanish Law of Science, Technology and Innovation, 2011).

The other 2 RPO (SGL and SU-SAV) are included in the relatively inactive group, as they have no measures in any of the main areas.

Following the categorizations of organisations from the survey, there are also 3 other types of organisations (NAS, KILDEN and CRUS). The first two in Group 2 and the last one in Group 3 (see table 4).

<table>
<thead>
<tr>
<th>Type of Organisations</th>
<th>Proactive</th>
<th>Relatively Active</th>
<th>Relatively Inactive</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ministry</td>
<td>2 (25%)</td>
<td>2 (25%)</td>
<td>4 (50%)</td>
<td>8 (100%)</td>
</tr>
<tr>
<td>RFO</td>
<td>5 (22%)</td>
<td>3 (13%)</td>
<td>15 (65%)</td>
<td>23 (100%)</td>
</tr>
<tr>
<td>RFO/RPO</td>
<td>2 (100%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
<td>2 (100%)</td>
</tr>
<tr>
<td>RPO</td>
<td>0 (0%)</td>
<td>2 (50%)</td>
<td>2 (50%)</td>
<td>4 (100%)</td>
</tr>
<tr>
<td>Other</td>
<td>0 (0%)</td>
<td>2 (67%)</td>
<td>1 (33%)</td>
<td>3 (100%)</td>
</tr>
<tr>
<td>TOTAL</td>
<td>9 (23%)</td>
<td>9 (23%)</td>
<td>22 (55%)</td>
<td>40 (100%)</td>
</tr>
</tbody>
</table>
Therefore, the distribution of Ministries and RFOs across the 3 proactivity level categories follows a pattern which is similar to the one followed by the total sample (more similar in the case of ministries): about one quarter of them are proactive organisations, another quarter are relatively active (13% in case of RFOs) and about half of them (65% in the case of RFOs) are inactive ones. It must be noted that Ministries and RFOs are the types of organisations more represented in the sample. The other 3 types of organisations show different distribution patterns: all the RFO/RPO organisations are proactive; half of RPOs are relatively proactive and the other half are relatively inactive; and finally, two thirds of “Other” organisations are relatively inactive while the other third (1) is a relatively inactive one. However, this last distribution pattern cannot be generalized at all because the 3 last types of organisations are barely represented in the final sample.

The present section includes other comparisons with regards to the particular measures reported by the organisation in the main areas of the survey, their level of implementation, whether they have indicators or impact evaluation of certain measures, etc. The analysis mainly focuses on approaches and patterns found within and between the 5 main areas of the survey.

2.4 Other Comparisons: Further Findings by Survey Area

2.4.1. Policies and Strategies aimed at integrating sex/gender analysis in research contents (P/S)

There were 16 organisations who report having a P/S in place (40% of the sample). Nine out of these 16 organisations are from Group 1 (100% of G1) and 7 from Group 2 (78% of G2). They include 50% of the respondent Ministries (4), 30% of the RFOs (7), 100% of the RFO/RPO (2), 25% of the RPOs (1) and 67% of the “Other” (2).

All these organisations report having a formal commitment from the institutional level towards the integration of gender in research contents. It seems that the issue is anchored in the strategic priorities of the organisations, most of the time together with the gender balance/gender equality policies or strategies. It is also observed that in most organisations the case of gender dimension in research is not yet as developed or it is not considered strategically to the same level as the equality policies between women and men in research careers.

However, only 8 out of the 16 organisations (6 from Group 1 and 2 from Group 2) report having criteria/indicators to measure success of such policies/strategies (that means 50% of the organisations which have P/S). Additionally, 44% out of the 16 have evaluated the P/S (7), and only 5 out of the 16 (31%) report having both indicators/criteria to measure success of the policies/strategies and having evaluated them. These are: FFG (AT), CIHR (CA), MINECO (ES), CNRS (FR), and ZonMw (NL). All of them belong to the proactive group.
Therefore, it is observed that only 12.5% of the total sample are organisations that have both a policy/strategy in place and institutional mechanisms to somehow monitor and assess the impact and effectiveness of such a policy/strategy, taking also into account that within the organisations which have evaluated their P/S, some of them report that such processes are in progress due to the time frame of the evaluation process (e.g. IRC, ZonMw). From responses received, it seems that the monitoring systems and evaluation processes are somehow less developed within this category of organisations.

The policies described vary from:

a) Laws (e.g. Spain);

b) Gender Action Plans (e.g. IRC Gender Action Plan 2013-2020, CNRS Gender Action adopted in 2014);
   Gender Policies (e.g. RCN’s Gender Policy 2013-2017 or WBF-SERI’s Federal programme of Equal opportunities for men and women at universities of applied sciences 2013-2016); national policies on sex and gender in Health (e.g. CIHR, The official Federal Health Portfolio Sex and Gender-Based Analysis -SGBA- Policy);

c) Policy statements (KILDEN, NIH), policies within specific programmes (e.g. FWF, Special Research Programmes), within the general internal institutional policy (e.g. FFG, Mission regarding gender mainstreaming or SNSF), specific statement in the Science policy of the institution (MOCW, Science Vision 2025), Diversity policy (ZonMw) and strategic priorities within the institution with its own structures and programs (e.g. CNRS, Mission for the Place of Women and Gender Challenge).

It must be noted that among the organisations with P/S there are only 2 countries which have national legislation on the matter. These are Spain and Austria.

The measure in Spain, mentioned both by MINECO and CSIC, is specific on the integration of the gender dimension in research content. It is covered in the Law of Science, Technology and Innovation (2011) which includes the gender perspective as a cross cutting category in research. The law requires this to become incorporated in subsequent national and strategic plans of action for research and innovation.

Regarding Austria, the law is only reported by 1 out of the 3 respondent organisations from this country (BMWF)\textsuperscript{32}. It is the Universities Act, which includes this main area through the establishment of organisational units responsible for the co-ordination of activities relating to gender equality and the promotion

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\textsuperscript{32} The two other organisations (FWF, FFG) are funding agencies
of women’s and gender studies in Universities. Such measure does not seem to be so specific on the integration of the gender dimension in research content, but the promotion of gender studies can be considered an important resource that facilitates the gendering of research as a cross-cutting dimension.

It must also be noted that although having a legislative framework helps to further develop a sounder strategy, it is not a necessary condition. There are several examples of well-developed strategies or policies which do not have a specific legal foundation. And the opposite case has also been found, where there is a legal coverage but no policy has yet been integrated or developed within the institutional mandate of the organisation (CSIC).

As it can be observed, there is a great variety of policies, strategies aimed at integrating the gender dimension in research contents among countries and organisations, and they adopt different policy regulations and rules depending on the national context and on the level of development of the organisation’s gender policies. It is generally noted that, except for few cases, the integration of the gender dimension in research fields follows the development (in different levels of depth) of the gender balance/gender equality policies and sometimes it is cross-linked with this area and not clearly specified.

It is also observed that the field of health research is the one where the integration of the gender dimension in research contents has been found to be more developed (see the cases of CIHR, NIH and MOCW and ZonMw).

Lastly, it must be noted that 9 out of the 24 respondent organisations which do not have a policy or strategy aimed at integrating the gender dimension in research contents state that they are planning to implement such a policy in the future.

There are 11 organisations out of the 40 respondent ones (27,5%) that have a Research Funding Programme (RFP) in place which have a policy requiring applicants seeking funding to specify whether they are considering sex and/or gender in their research designs.33

Not surprisingly, 9 out of this 11 are from Group 1 (which means 100% of the proactive organisations) and 2 (RCN and WBF-SERI) from Group 2 (22% of the relatively active organisations). This RFP measure is carried out by 38% (3) of the Ministries (WBF-SERI, MINECO, BMWFW), 26% (6) of the Research Funding Orga-

33 This is the question that respondents answered in the survey regarding this main area (see the Compendium D.3.9). It does not refer to specific research programmes on sex/gender but programmes where sex/gender is explicitly integrated.
nisations (CIHR, FFG, FWF, IRC, RCN, ZonMw), 100% (2) of the RFO/RPO (CNRS, NIH), and by none of the RPOs & Other organisations.

All of the respondent organisations who reported having such RFPs (11) also reported having a P/S, but these 11 are only the 69% of the 16 organisations who reported having P/S. This means that having a P/S is not a sufficient condition to have a RFP, but seems to be a necessary one. These 11 organisations seem to have taken a step further than the other 5 ones to implement the Policy/Strategy through the policy in the Research Funding Programmes.

At the level of implementation of the Research Funding Programmes two different approaches have been found: i) organisations that only integrate gender in research content requirement (somehow) in some specific programmes; and, ii) organisations with a broader implementation level where gender in research content requirement is explicitly integrated in all the programmes, as a cross cutting question.

Following the first approach there are organisations such as BMWFW (Sparkling Science), FWF (in 2 pilot programmes), FFG (FEMTech Research Projects), WBF-SE-Ri (small budget to fund research projects which take in consideration sex/gender in research), and CNRS (Gender Challenge, a specific funding programme).

In the second approach there are organisations like CIHR, MINECO, RCN and IRC (see below in Successes and Good Practices section), which require all applicants to grant programmes to respond to mandatory sex- and gender-relevance questions when completing grant application forms (which is also the case in H2020 work programmes34).

Regarding the advances done to evaluate the impact of the RFP measure, only 7 (67%) out of the 11 organisations with such RFPs reported also having indicators to measure the success, and only 6 out of 11 (55%) reported having evaluated the measures. However, only 5 out of these 11 organisations (45%) reported having indicators, as well as having conducted evaluations of RFPs: BMWFW, FFG, CIHR, CNRS and RCN.

Lastly, from the results of the survey, 6 out of the 29 organisations which do not have a policy as part of their Research Funding Programmes aimed at fostering sex/gender analysis in research contents report planning to implement such a policy in the future (20%). It also must be noted that 85% of the respondent organisations were interested in learning more about how to include sex/gender considerations in the research field(s) they are supporting/developing.

34 See Fact sheet: Gender Equality in Horizon 2020 and Vademecum on Gender Equality in Horizon 2020
11 out of the 40 respondent organisations (28%) report having Guidelines and Training materials to assist applicants in integrating sex and/or gender into their research designs (GTAs).

Again not surprisingly, 9 out of these 11 organisations are among the proactive ones (the 100% of Group 1) and the other 2 (GESIS and HRB) are among the relatively active organisations (22% of Group 2).

This GTAs measure is reported to be carried out by 25% (2) of the respondent Ministries, the 26% (6) of the RFOs, the 100% (2) of the RFO/RPO (2) and the 25% (1) of RPOs but by none of the “Other” respondent organisations.

Not all of the 11 organisations who reported having both P/S and RFPs have also reported having GTAs. The majority (9 out of them) has done it (82%) but there are two exceptions: RCN and WBF-SERI. As per the former, the organisation reports being first considering improving the organisation’s systems of assessments, including training for administrative staff, panels and boards and then, as a further step, developing such training/guidelines. In the case of WBF-SERI, the organisation does not have the mandate to develop such guidelines/training for applicants.

Moreover, although only 56% of organisations who reported having P/S have also reported having GTAs, two organisations, although without policies/strategies or RFPs aimed at integrating sex/gender analysis in research contents, are developing guidelines/training for applicants. One of these organisations is GESIS, which provides trainings to early researchers that plan to apply for research funding in other funding agencies. GESIS integrates and mainstreams sex and gender analysis in their Workshops for students and PhD candidates. They also include materials prepared by trainers (international academics, Professors and Senior staff).

Additionally, only 6 out of the 11 organisations who reported having GTAs (55%) also reported having guidelines for reviewers: CIHR, FFG, FWF, BMWFW, MINECO, and IRC. The exceptions are CNRS, ZonWw, NIH, GESIS and HRB.

None of the organisations which have guidelines for applicants have recommendations for curriculum development and the opposite is also true.

Regarding the effort from these organisations on training applicants on how to integrate gender in the contents of research, two approaches have been found:

- Organisations where there is a proactive initiative to facilitate or enable access to specific information for applicants, with specific manuals, or where the information appears explicitly in specific documents targeting especially the applicants for funding programmes, and where there are also targeted
online training and workshops. This is the case of CIHR, IRC, CNRS and NIH. These organisations also mention line courses and workshops for this purpose (also GESIS).

Organisations where information/training is less specifically targeted to applicants and less specifically related to funding programmes. They have generic guidelines and trainings on gender in research contents. It seems that there are no documents prepared ad hoc to support or to train the applicants on how to integrate the gender dimension with a focus on the organisation’s research funding programmes. They refer their applicants to webpages or other documents (such e.g. Gendered Innovations project, Toolkit. Gender in EU-funded research, etc., as it is the case for HRB, MINECO, BMWFW, FWF, FFG or ZonMw (which provides a document with information on diversity including sex/gender analysis in research contents).

6 out of the 40 respondent organisations (15%) reported having Guidelines/Training for Grant Proposals Reviewers to assist evaluators in reviewing the sex/gender components of research proposals (GTRs): BMWFW, FWF, FFG, CIHR, IRC, and MINECO. All of them fit into Group 1 (67% of this proactive group). The exceptions from this Group 1 are CNRS, ZonMw and NIH, which have no measure on this subject.

The GTRs measure is reported to be carried out by 25% (2) of the Ministries (BMWFW and MINECO), and by 17% (4) of the RFOs (CIHR, FFG, FWF, and IRC).

100% of the organisations which have guidelines for reviewers have also a policy or strategy (P/S), research funding programmes (RFPs) and guidelines for applicants (GTAs). Therefore, it seems that these measures are pre-conditions to developing GTRs.

However, it also must be noted that only 6 out of the 16 organisations which have P/S (38%) also report having GTRs, and only 6 out of the 11 organisations which have reported having research funding programmes (55%) also reported having guidelines or training materials for reviewers.

None of the organisations with GTRs has recommendations for university curricula development, and the opposite is also true.

Again, the same approaches found on the GTAs measures seem to operate on GTRs: the higher level implementation with specific resources targeted for reviewers (e.g. CIHR and IRC) versus more generic information (carried out by organisations such as MINECO, BMWFW, FFG).
Regarding the first approach, CIHR and IRC seem to have a clearer line of action, where specific documents/manuals are developed or are part of the briefing process for evaluators with guidelines on the necessity of taking the integration of sex/gender in the research content into consideration in the evaluation process (see case studies section)

NIH is in the process of developing internal guidelines explicitly for the US National Academies, and CNRS also counts with evaluators of its Gender Challenge Program who are experts in gender analysis.

There is only 1 out of the 40 respondent organisations (3%) who reported having Recommendations and/or Models for University Curricula Development (RMUCDs): NAS, included in Group 2, relatively active organisations (11% of this group), and a National Academy in the USA (Other organisation type).

NAS provides the National Academies Press site with several publications that make recommendations to universities.

30 out of the 39 organisations (77%) who stated not having RMUCDs attribute it to their lack of responsibility for university-level curricula development. The rest of the organisations state that: universities in their national context are autonomous (BMFW, MENESR), it is not in the mandates of organisations (GESIS, CRUS and WBF-SERI) and that Recommendations are under preparation (SMM).

The respondent organisations were also asked to name any universities which they knew developed the integration of sex/gender analysis in the curricula of fields outside Social Sciences and Humanities, and this knowledge was also found to be very limited. GENDER-NET attempts in its WP3 to develop and design support material for adapting common promising practices in transnational context and under this task the project will develop recommendations and models for curricula development in scientific and technological fields including multi-disciplinary and interdisciplinary approaches.

Therefore, it seems that the scope of this specific issue (gender dimension in university curricula contents) is not suitable for the framework and focus of responsibility of the organisations approached in the survey. It is recommended to develop other specific projects/activities in other to target the right institutions and the right institutional levels (decision makers) to approach the integration of the gender dimension in curricula development at university level.
2.4.6. Transnational Activities (TAs)

There are 33 organisations out of the 40 respondent ones (83%) who declared having undertaken an activity in a transnational context (e.g. international/European) aimed at fostering the integration of sex/gender analysis into research contents/projects/programmes.

Particularly, there are 12 respondent organisations (RFO or RPO) that are members of Science Europe, among which 11 are currently involved in the Science Europe Working Group on Gender & Diversity\(^\text{35}\). This working group, set up in August 2014, brings together experts from Science Europe Member Organisations to reflect on and discuss challenges related to gender and diversity issues in science and academia. Five out of these 11 organisations are also participants in the GENDER-NET project (CNRS, RCN, DFG and FWF (as Observers) and SRC (as part of the Expert Advisory Board). The other 5 are DNRF and DFF (DK), ANR (FR), SFI (IE), CSIC (ES), RCUK (UK). Only the Irish IRC is not (yet) a member of the working group.

Additionally, 7 respondent organisations, most of them Ministries, have reported being represented in the Helsinki Group on Gender in Research and Innovation (HG)\(^\text{36}\). Three out of these 7 organisations are also GENDER-NET partners (MENESR, MINECO and RCN). The other 4 organisations are the Austrian, Czech, Dutch and Lithuanian ministries in charge of research (BMWF, MSMT, MOCW and SMM).

2.4.7. Other Activities (OAs)

16 organisations from the total sample (40%) have indicated participating in other types of activities aimed at fostering the integration of sex/gender analysis into research contents/projects/programmes. Although some of the respondents already indicated their participation in the GENDER-NET project, in the Helsinki Group and in the Science Europe working group on Gender & Diversity, there is also participation and collaboration in different ways and at different levels in the following projects/events:

- **The genderAG Working Group**

  The genderAG working group was established in Austria in 2007 and since 2013 it includes experts from the Austrian Cooperative Research (ACR), the Austrian Research Promotion Agency (FFG), the Austrian Science Fund (FWF) and Joanneum Research (JR). The goal of the working group is to increase the visibility of each organisation’s gender mainstreaming activities in order to promote the topic of equal opportunities for women and men in the research world.

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\(\text{35 as of June 2015}\)

\(\text{36 The Helsinki Group on Gender in Research and Innovation was established in 1999. The Helsinki Group brings together representatives from Member States and Associated Countries, to promote equality between women and men in research and innovation (R&I) and to embed the gender dimension in science, research and innovation contents and programmes.}\)
European Conference on Gender Equality in Higher Education

The European conferences on gender equality in higher education have since 1998 brought regularly together gender equality practitioners, researchers and administrators from Europe and beyond. The conferences provide an international forum to discuss and exchange information and experiences and share research results on the changes and challenges related to gender in academia, gender equality promotion and interventions in higher education and research institutions. The first European conference on gender equality in higher education was organized in Finland by the University of Helsinki in 1998, and since then the conferences have travelled across Europe: to Zürich (2000), Genoa (2003), Oxford (2005), Berlin (2007), Stockholm (2009), Bergen (2012), and Vienna (2014).

The Gender Summit

The Gender Summits are a series of interconnected action based conferences held across the globe under the theme Quality Research and Innovation through Equality. The aim is to make gender equality the norm in science and to embed gender as a primary dimension of research and innovation quality. The Summits were established in 2011 in Europe. There have been 5 Summits since, including in North America (November 2013), Africa (April 2015) and with upcoming ones in Asia-Pacific (August 2015) and Europe again (Berlin, November 2015).

GenPORT project

GenPORT is a project funded under the EU’s 7th Framework Programme (Science in Society) and launched in 2013. GenPORT is a developing online community of practitioners, served by an internet portal and made up of organisations and individuals working across the globe for gender equality and excellence in science, technology or innovation. GenPORT covers all sciences - natural and social sciences, and humanities, and is intended to serve as a comprehensive gateway to all gender and science resources.

ATGENDER: The European Association for Gender Research, Education and Documentation

The European Association for Gender Research, Education and Documentation is a broad association for academics, practitioners, activists and institutions in the field of Women’s and Gender Studies, Feminist Research, women’s rights, gender equality and diversity.

The purpose of this association is to provide a professional association for academics, to advance and disseminate the knowledge and experience from the
field and to develop and support international cooperation in Women’s and Gender Studies and Feminist Research in Europe and beyond.

■ GENDERA project

The GENDERA project, a project funded through the 7th Framework Programme- Science in Society-2009, brought together and discussed experiences in the practical realization of gender equality in research organisations and higher education institutions, with the overall objective to facilitate the implementation of gender balance in science and create an enabling environment to integrate the gender dimension into science policy throughout Europe.

■ InterAmerican Network of Academies of Science (IANAS)

IANAS is a regional network of Academies of Sciences created to support cooperation towards the strengthening of science and technology as a tool for advancing research and development, prosperity and equity in the Americas. Founded 2004, the main objectives of the network are to assist in the building of national scientific capacities by strengthening science and technology relationships among the countries of the Americas, as a tool for societal development and to cooperate in building capacities of the Academies of the region, through exchange of information and experience.

■ genderSTE COST action

genderSTE is a policy-driven targeted network funded by COST (European Cooperation in Science and Technology). The aim of this 4-year action launched end of 2012 is to help advance implementation of gender-focused recommendations for structural change in science and technology institutions and research programme content. The project also works to advance the state of the art in gender mainstreaming in key fields in which this has not yet been sufficiently addressed such as cities, transport, energy, climate change and industrial innovation. Members of genderSTE represent government bodies, research organisations, universities, non-profits, and private companies from 40 countries, as well as international organisations, in Europe and beyond.
This section presents the successes and promising practices identified from the responses to the survey on the ways in which organisations are enforcing within their national contexts, the integration of the gender dimension in research contents, either through specific policies or strategies, or through the implementation of their research funding programmes, or by means of materials/training for applicants and reviewers, or through other measures and initiatives.

These examples serve as an inventory of cases which can be applicable to other contexts (transferability) and which provide valuable lessons and insights into new ways of integrating the gender dimension into research contents. The cases are selected by each main area from the survey.

1. Having a specific policy or strategy aimed at integrating the gender dimension in research content can, besides being a good practice in itself, also be considered as a success factor to facilitate the further development of the other main areas (such as having and implementing a research funding programme aimed at integrating the sex/gender analysis in research, having training and guidelines for applicants and reviewers or other type of measures). The best examples among respondents in this sense are the following cases: CIHR and IRC (for these two, see the case studies section); MINECO, where the topic is integrated in the Spanish Law of Science, Technology and Innovation (2011); CNRS, which has set it as a strategic priority to promote interdisciplinary gender research and the integration of the gender dimension including in fields outside social science and humanities; and RCN, including it in its Gender Policy 2013-2017.

37 The promising practices below described have been selected by authors on a comparative basis from the respondents’ answers: the best compared to others, although not in the sense of evidence-based best practices. That is, the respondent organizations have not identified those practices as best practices, but the authors of the present report have found that these are the ones that better seem to work or innovate compared to the other answers and therefore can be labelled as “promising” practices.

38 The law establishes a national framework for the promotion and coordination of scientific and technical research. The 13th additional disposition is dedicated to the implementation of gender mainstreaming. The second theme of this disposition establishes that the Spanish Strategy for Science, Technology and the National Action Plan for Scientific and Technical Research will promote the inclusion of the gender perspective as a cross-cutting category in research and technology, so that it is considered in all aspects of the processes, including the definition of priorities for scientific-technical research, scientific problems, theoretical frameworks, methods, collection and data interpretation, conclusions, applications and technological developments and proposals for future research. They will also promote women and gender studies as well as specific measures to foster and to recognize the presence of women in research teams.

39 This objective has been included in the Gender Action Plan adopted by CNRS in 2014.

40 RCN will:
   - assume greater national responsibility for promoting gender perspectives (GP) in research and innovation
   - work more systematically to promote GP within research funding
   - strengthen the knowledge base on GP for use in research and innovation policy
2. Having a good monitoring and evaluation system is also considered a good practice and a success factor. Organisations which have a system to evaluate their own P/S or funding programmes in order to assess their own impact are therefore considered good examples. An evaluation provides transparency and accountability but it also allows tracking progress and identifying issues early during implementation, thus providing an opportunity to take corrective action or make proactive improvements as required and to inform decision makers about how to build on or improve such a policy. The best examples among respondents on this area are: CIHR (see case studies section); CNRS, with *internal annual reviews of programmes which have shown progress in the level of integration of the gender dimension in research and led to the evolution of certain programmes*; and the evaluation conducted by ZonMw, which facilitated that, on the basis of outputs, the organisation developed a new proposal for integrated diversity (including sex/gender) within the organisation and funding process.\(^{41}\)

In the cases of reported monitoring and evaluation measures, the outputs and impact of the P/S have been found to be positive and successful:

- increased recognition of gender as a legitimate and necessary consideration in research
- progressive increase in the number of funded researchers who are integrating sex and/or gender into their studies
- several other funding organisations have taken proactive steps by asking applicants to consider integrating sex and gender into research proposals
- the promotion of a solid interdisciplinary community of research in gender issues

3. Due to the problem detected about confusion or lack of clarity as to the distinction between gender equality/gender balance policies and the policies aimed at integrating the gender dimension in the contents of research, it is considered good practice to make an explicit division between these two areas within the gender policy of the institution. Good examples in this case are the examples of CIHR, IRC, NIH (see these three in the case studies section) and the Gender Policy of RCN, where one of its main areas is “Gender perspectives in research and innovation.”\(^{42}\)

4. To have a legal framework which supports the integration of the gender dimension in research contents can help in giving the legitimate support to develop the implementation of such policy, but it is not always necessary or sufficient. In Spain there are two organisations (MINECO and CSIC) under the same Spanish legal framework. MINECO is reinforcing this legal norm through a specific policy and integrating the topic in its research funding


programmes, hence taking the law a step further in its implementation, while CSIC is not yet at that level of implementation, though operating in the same legal context. Other organisations have solid policies or strategies in the subject and carry out their implementation within their institutional frameworks, indicating that the presence of a legal framework is not a conditional element per se (CNRS, CIHR, RCN, and IRC as examples).

5. Providing the institution with the structures and bodies required to strengthen and properly implement the gender policy/strategy is also considered a good practice and a success factor for the design, promotion, coordination and monitoring of the P/S aimed at integrating gender dimension in the contents of research. As an example of this practice, CNRS develops its strategy through several programmes and structures:

- **Mission for the Place of Women:** at CNRS with one of its main priority actions areas being the promotion of the mainstreaming of the gender approach in research
- The “Défi Genre” (Gender Challenge) Programme at the CNRS Mission for Interdisciplinarity: This challenge aims to introduce and support research on gender in new areas: biological sciences, chemistry, environment, engineering, information science ... *by following the scientific principle which has made innovation in Social and Humanities Science - see and analyse the difference is the inclusion of gender differences in science*
- The Institute for Gender

1. As in the case of P/S mentioned earlier in this chapter, having a RFP aimed at the integration of the sex/gender analysis in research fosters the development of subsequent measures or initiatives aimed at informing and training applicants and reviewers. Additionally it strengthens institutional commitment by adding a level of implementation and applicability to their own policy or strategy. Good examples in this sense are cases like CIHR, IRC (see case studies section for both of them), MINECO⁴³ and RCN⁴⁴

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⁴³ The following question has been included in the application form that researchers have to fill online when applying for research funding from the National Plan for R&D. This affects ALL research funded by the Spanish National Research Plan, which is most research done in the country: “If your project investigates human beings, do you think the gender (men/women) of the subjects analysed can impact the research results? (Yes/No)”

⁴⁴ Requirements for RCN grant proposals: “Gender perspectives in the research: The Research Council views it as essential that gender perspectives are given adequate consideration in research projects where this is relevant. Good research must take into account biological and social differences between women and men, and the gender dimension should be one of the main pillars of the development of new knowledge. In research projects this dimension may be manifested through the research questions addressed, the theoretical approaches chosen, the methodology applied, and in the efforts to assess whether the research results will have different implications for women and men”
2. When an organisation has a RFP in place which requires that all applicants to grant programmes respond to mandatory sex and gender relevance questions when completing grant application forms, it has been shown to be a good practice and a success factor to include after such questions, when the answer is NO, the requirement to explain why not. Thus applicants must explain why the analysis of sex and gender is not relevant to their investigation. See in the case studies section the example of CIHR.

3. Having appropriate funds for the Research Funding programmes which allow implementation of sex/gender considerations in research designs and projects is also considered good practice because it allows providing the necessary resources (human, material and financial) to accomplish the goal. Moreover, the availability of funds exclusively dedicated, or conditioned, to projects which integrate sex/gender analysis in their projects, is considered a success factor to encourage and promote the widespread inclusion of the gender dimension in the contents of research. A case of good practice in this regard is the Research funding Programme from WBF-SERI which reserves a small budget to fund research projects which take into consideration sex/gender in research, or the case of NIH, which in 2014 provided supplemental funding (seed grants) to reinforce the research of 82 grantees to explore the effects of sex in preclinical and clinical studies. As stated by FFG, in the FEMtech Research Projects, “the beneficiaries are mainly enterprises and research institutions that were already considering gender issues in their research activities. It is true for all projects and research institutions that the implementation would not have been possible without funding of “FEMtech Research Projects” due to insufficient financial means”.

4. As also mentioned in the above section on P/S, the evaluation of the Research Funding Programmes at all levels is considered a good practice and a success factor. An example of good impact of the programmes is shown by the evaluation conducted by CNRS: “The “Défi Genre” has considerably increased the level of awareness and integration of gender aspects in research contents, projects are expanding, gender is being integrated into the other “Défis” as a key criterion, and a network of laureates has developed. The “Défi Genre” has also gained international recognition”.

Another good example of evaluation is the case of FFG, which after evaluating their FEMtech Research Projects, reached some conclusions regarding the level of satisfaction of applicants: “Enterprises and research institutions are highly

45 CIHR: One of the questions in the application form to the enquiry whether sex/gender considerations are taken into account in the study is: “If NO please explain why sex and/or gender are not applicable in your research design [2000 characters limit]” http://www.cihr-irsc.gc.ca/e/32019.html
satisfied with the sub-programme and the persons questioned confirm interest in re-participating in “FEMtech Research Projects” (Part of the results of the evaluation of the programme “Talents”).

5. To have a well-developed and supported system of Gender Studies at national level is a good practice in terms of providing evidence and advancement in knowledge and practice, as some organisations have stated “leading to increased recognition of gender as a legitimate and necessary object of research” (CNRS). BMWFW in its Universities Act “contains references to the establishment of an organisational unit responsible for the co-ordination of activities relating to gender equality and the promotion of women’s and gender studies (….). The universities are obligated to establish a Women’s Studies Coordination Center and Women’s Office that is responsible for the coordination of women and gender studies”. Another example is KILDEN that, although not having a RFP in place, its mandate is to give service to the gender research/studies environment in Norway.

3.3 Guidelines and Training Materials for grant Applicants (GTAs)

1. Organisations having GTAs are more likely to also have GTRs. Good examples on GTAs are described in the case studies section (CIHR, IRC). Other examples are the case of CNRS, where in its “Gender Challenge Programme” the call texts themselves contain detailed information on the requirements and objectives, to better assist applicants. In addition, the “Mission pour la place des femmes au CNRS” has developed a basic online training and organized targeted training workshops for researchers on how to integrate sex and gender analysis in their research, in order to foster future applications, and organized national conferences on this subject.

2. It is important and a good practice to provide information related to the integration of the sex/gender analysis in relevant materials and documents accessible to applicants, targeting specifically the process of calls for proposals.

It is considered a good practice to include in the manuals (or instructions) for applicants on the submission of applications, the relevant information to guide them on how to meaningfully integrate sex/gender analysis in their research designs, making explicit how they should specify whether this is relevant to their research.

The information provided should be available, easy to find, user-friendly and targeted specifically to applicants (as opposed to general information) and integrated in the submission call process (see CIHR at case studies section).
3. Provide face-to-face and on-line training for applicants on the integration of sex/gender analysis in their research. This is the case of GESIS (the only respondent organisation with no measures apart from GTAs), which provides sex and gender analysis mainstreamed in Workshops for students and PhD candidates, and materials prepared by trainers (international academics, Professors and Senior staff). See also in the case studies section the IRC example.

4. To train staff in charge of assisting and guiding the applicants on the submission of calls, to pass on the relevant information in this respect.

3.4 Guidelines and Training Materials for grant proposal Reviewers (GTRs)

1. It is considered a good practice to develop manuals or guidelines targeted specifically to evaluators or assessors in the process of validation of proposals rather than just disseminating general information (such as webpages or manuals) on the topic. See examples of CIHR and IRC in the case studies section.

2. It is also important to have a training programme aimed at providing evaluators with the necessary knowledge and tools to appropriately assess the proposals considering the integration of sex/gender analysis (see IRC in case studies). This can be workshops or briefings which all evaluators should undertake before the evaluation process.

3.5 Recommendations and/or models for university curricula development in scientific and technological fields (other than humanities and social sciences) (RMUCDs)

Having RMUCD is a good practice because it contributes to developing the sex and gender analysis capacities among undergraduate and postgraduate students, and among future researchers as well. NAS has developed several publications on the National Academies Press web site\textsuperscript{46} that make recommendations to universities.

It should be noted that these three last issues are more directly addressed through another Task within the GENDER-NET WP3 work plan (Task 3 – Designing support material for adapting common best practices to transnational contexts) and will be developed in our upcoming D3.11 report (\textit{Manuals with guidelines on the integration of sex and gender analysis in research contents, recommendations for curricula development and indicators}) which will target funding agencies, evaluators of grant proposals, and offer recommendations on curricula development, as well as proposing indicators for monitoring the state-of-play and progress in the field of the integration of sex/gender analysis in research contents and programmes.

\textsuperscript{46} \url{www.nap.edu}
3.6 Transnational Activities

The importance of transnational activities aimed at integrating sex/gender analysis in research contents should be stressed. While only a minority of the sample organisations is proactive at the national level, a majority of the respondent organisations (33, 83% of the sample) participate in transnational activities (see section 2.4.6). As such, the transnational activities have potentially a high leverage effect on national policies.

Sharing Good Practices, especially in the international context, is also a good practice in itself in order to improve knowledge and expertise and support less active countries/organisations on the process of developing policies and strategies and aligning with other countries (promising practices) and EU policies.

Transnational activities of course also allowing the development of joint initiatives which would not have been possible at national level only, and therefore can further enforce the uptake of sex/gender analysis in research contents in Europe.

3.7 Other Successes/ Promising Practices

In addition to the successes and good practices provided by the analysis of the answers given by the respondent organisations, some other good practices that are difficult to categorize in any of the particular main survey areas were noted by GENDER-NET members during the following WP3-related workshops:

- **Expert workshop on comparative analysis of national/regional policies and programmes on the gender dimension in research contents (GENDER-NET, Brussels, February 2015)**

- **Workshops delivered with Recommendations on the gendering of research contents for funding agencies, evaluators, curricula development (GENDER-NET, Paris 2015)**

- **Workshop to identify common elements for transnational implementation and criteria for indicators for monitoring of state-of-play and progress on the integration of the gender dimension in research contents (GENDER-NET, Bern May 2015)**

The last two workshops were aimed at providing input for the GENDER-NET reports D3.11 *Manuals with guidelines on the integration of sex and gender analysis in research contents, recommendations for curricula development and indicators* and the D3.12 *Elevating Promising Practice: Potential Transnational Actions for Integrating Gender Analysis into Research*, however the preliminary outputs are useful for this section and will be further developed in the above mentioned deliverables. Among these preliminary outputs are the following:

1. **Leadership with a high level commitment** and political will is perceived as a paramount success factor in supporting policies and programmes aimed at integrating the gender dimension in research contents. However freedom of research can also be observed as a challenge and a resistance when applying or enforcing certain research criteria.
2. **Wide dissemination** of the results and concrete examples of research which integrate sex/gender analysis in research contents to the research community and general public can also facilitate the change of general attitudes towards the need to consider sex and gender analysis as a factor of excellence and therefore improve the research culture.

3. **Peer-to-Peer awareness raising** and dissemination in terms of “scientists convincing scientists” can also facilitate the change of research culture into the importance of integrating sex and gender analysis as a factor of excellence.

4. **Training and capacity building** of other staff, not only applicants and reviewers, but also middle and higher level managers, officers and administrative staff on the relevance of the gender dimension in research and the organisational policies, strategies and programmes on this matter.

5. **Good data collection**: to elaborate statistics and improve the gender analysis of data on the level of integration of sex/gender analysis in calls and approved projects as well as identifying gaps in data bases and other data collection systems is also a good practice, not only the examples above mentioned, about P/S and RFPs evaluations. Good data collection is also needed on the impact of guidelines and training resources and on university curricula development as well.
4. **Barriers and Challenges**

This section presents the barriers and challenges that have been identified by respondent organisations report as motives to their lack of implementation or success of different measures aimed at integrating in their own contexts the gender dimension in research contents (measures such as specific policies or strategies, research funding programmes, materials/training for applicants and reviewers, recommendation for university curricula development or other initiatives).

The identification of such barriers is useful in order to develop strategies to overcome them and to define new challenges and relevant factors to be taken into account when trying to apply in other contexts (transferability) the above-mentioned measures to improve the integration of sex and gender analysis into research contents. The findings are presented by each specific main survey area.

The analysis is focused on the main answers given by the respondent organisations when asked in the survey about any challenges/obstacles they had encountered in implementing their policy/strategy, or about the reasons why there are not planning to introduce such a policy/strategy.

4.1 **Policies and strategies aimed at integrating sex/gender analysis in research contents (P/S)**

Firstly, some of the reasons given by the respondent organisations which were not planning to implement the P/S are:

- **Lack of high-level support** to define such a strategy (FNRS)
- **The organisation has no competence** to define such a policy. (SGL)
- **Lack of awareness and understanding of the topic.** For instance, AKA reports that the Academy funding is allocated on a competitive basis to the best researchers and research teams and to the most promising young researchers for carrying out scientifically ambitious projects. Others, like LCS, report that their funding is based on scientific excellence and gender issue is not a real problem (OTKA)
- **A sort of preference for gender not being explicit among the review criteria,** taking for granted that review factors have not to be decided by themselves but by the international peer reviewers. The organisation relies on the expertise and best practice of international peer reviewers to decide depending on the proposal whether to take this and any other relevant factors into consideration when carrying out a review (SFI)
- **Lack of enough information on experiences** from others in order to make balanced decision on possible implementation (NWO)
- **Lack of interest on the issue** (SU-SAV)
Secondly, several reasons or motives were provided by the 8 organisations who responded to the survey on whether they had encountered any challenges/obstacles in implementing their policy/strategy:

- **Level of resistance**, mainly due to a lack of understanding of issues related to gender in research content (CNRS)
- **Gender is one between other relevant themes** that applicants have to answer to in the proposal process and it is not for granted that it is successfully mentioned (ZonMw)
- **Confusing gender in research contents with gender equality/gender balance** as a political goal (RCN)
- **Limited awareness/knowledge** of the importance and relevance of gender in several research areas (RCN)
- **Lack of awareness or expertise** in the understanding and implementation or know-how of the gender dimension for evaluators and policy makers (MINECO)
- **Gender in science seems to be even less recognized** in general than in other social spheres (such as labour market, politics, etc). Within Science, it has been reported that particularly in STEM fields, the necessity, utility and potential of gender are usually ignored while in social sciences it seems to be more evident and useful (WBF-SERI)
- **Some organisations perceive that there are certain legislative, organisational or contextual factors that might influence the transferability** of one’s policy to similar organisations in other countries. The different political, legal, historical and administrative traditions have been put forward (for instance, in the comments made by MINECO and WBF-SERI).

Some of the organisations’ rationales for not requiring sex and/or gender considerations to be taken into account by applicants in the funding programmes are:

- **This would require a change of mind set and high-level support** (FNRS)
- **The organisation (council) chose not to take up the topic** (DFF)
- **The organisation relies on the expertise and best practice of international peer reviewers** to decide depending on the proposal they are reviewing

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47 D.3.9 Compendium (page 113) *The Spanish experience can be useful for countries with political and administrative tradition similar to the Spanish one, not really for countries with a more liberal tradition where the legislative role is lesser, as is the case of the United Kingdom. “An adaptation from the Swiss historical, political, legal and structural context to other contexts would be necessary”* (page 121)
whether to take this and any other relevant factors into consideration when carrying out a review (SFI)

- Learn from experience of others before implementing such policies ourselves (NWO)
- Gender/sex analysis in research is now considered to be established, and so does not get extra support but is assumed to compete for regular research funding from our council on equal terms with other research (SRC)

29 organisations reported not having guidelines and/or training materials to assist applicants on how to integrate sex and/or gender into their research designs. Some of the comments from organisations, on the question asking them to explain why they did not have such guidelines and/or training, include the following aspects:

- 2 organisations report not having expertise to develop sex/gender guidelines and/or training for applicants (RPF and NWO)
- Organisations report that sex/gender training is not considered as part of the organisation’s mandate (AKA, OTKA, LCS, MOCW, WBF-SERI, KILDEN, HEI)
- No will from policy makers (MSMT)
- The organisation chose not to take up the topic; hence it is not included in guidelines (DFF)
- There are guidelines which provide practical information for the submission of proposals to our calls but they do not provide assistance to applicants for developing their research design (ANR)
- We rely on the expertise and best practice of our international peer reviewers to decide depending on the proposal they are reviewing whether to take this and any other relevant factors into consideration when carrying out a review (SFI)
- A recommendation for research institution is under preparation (SMM)

34 organisations reported not having guidelines and/or training materials/workshops to assist evaluators in reviewing the sex/gender components of research proposals. Some of the reasons given by organisations to explain this circumstance are as follows:

- The organisation does not have the expertise to develop sex/gender training guidelines (RPF, MSMT, LCS)
At the moment, **there are no policies in place** requiring applicants to consider sex/gender in their research design, and **so there are no training materials for reviewers** related to this (NSERC, FNRS, NOW)

- The organisation chose not to take up the topic; hence it is not included in guidelines for evaluators (DFF)
- The integration of sex/gender in research design is perceived as one of the criteria of excellence. It is therefore considered during the evaluation process, but no formal restrictions exist (DFG)
- The organisation relies on the expertise and best practice of international peer reviewers to decide depending on the proposal they are reviewing whether to take this and any other relevant factors into consideration when carrying out a review (SFI, HRB)
- The organisation is in the process of developing these guidelines (ZonMw, NAS, RCN⁴⁸)
- **There are guidelines** and training for the peer review groups regarding the formal rules and the review process; e.g., gender equality and conflicts of interest **but not regarding the contents of the research** (SRC)
- **It is not the organisation’s mandate** (WBF-SERI, KILDEN, HEA, SMM)

In addition to the challenges and barriers provided by the analysis of the answers provided by the respondent organisations, some other challenges, which apply to any of the particular main survey areas on the gender dimension in research contents, were also noted by GENDER-NET members during the workshops above-mentioned. Other barriers and challenges identified are:

- **Lack of awareness-raising/knowledge**
- **Not acknowledging and valuing gender expertise**, shown by a lack of resources allocation
- **Lack of sound monitoring and evaluation processes**: as gender dimension not being integrated into evaluation and the lack of mandatory criteria for implementing gender analysis in the evaluation process
- **The issue of academic freedom of researchers** could render difficult the approach of conforming to the policy or strategy and this could be perceived as interference from the institution in the autonomous and independent research

⁴⁸ RCN is “in the process of developing such guidelines. We are open to all relevant information and learning from GENDER-NET and others concerning training for reviewers. However, this might be considered a next step for us. First step will be improving our own systems of assessments, including training for our administrative staff, panels and boards” (pag. 99 Compendium D3.9)
- Lack of legal framework
- Lack of training for researchers and programme managers
- There is also the challenge concerning the argument of the excellence of the research
- The barrier based on the argument of the independence of evaluators
- There is a need of examples of policies which work: more information on experiences from others is necessary to make balanced decisions on possible implementation
- Lack of interest on the issue
5. Case Studies

This section presents a further review of three case studies from the respondent organisations which have been chosen for being good examples regarding the general objective of integrating the gender dimension in their own research funding systems.

The first two examples, CIHR (CA) and IRC (EI), are respondent organisations with a consistent approach throughout 4 main areas of the survey, in a more systematic manner than others and following logical criteria: from the development of a policy/strategy, to the implementation of such a P/S in all their research funding programmes, with examples of evaluation processes to assess the impact of those measures and finally, to their efforts oriented towards the capacity-building of applicants and reviewers in order to guide them in the call application process and in the evaluation process of proposals.

The case of NIH (USA) is also included in the present section due to its important initiatives and measures in areas which have not been found in the other respondent organisations.

The three cases will be reviewed across the first four main areas of the survey.

5.1. Canadian Institutes of Health Research - Institute of Gender and Health (CIHR-IGH)

The Canadian Institutes of Health Research (CIHR) is the Government of Canada’s health research investment agency. Its mission is to create new scientific knowledge and to enable its translation into improved health, more effective health services and products, and a strengthened Canadian health care system. Composed of 13 Institutes, CIHR provides leadership and support to health researchers and trainees across Canada.

5.1.1. Policies and strategies aimed at integrating sex/gender analysis in research contents (P/S)

CIHR is signatory on the Federal Health Portfolio Sex and Gender Based Analysis (SGBA) Policy and is thus required to undertake the policy’s implementation.

The official Federal Health Portfolio Sex and Gender-Based Analysis (SGBA) Policy states: “It is the policy of the Government of Canada’s Health Portfolio to use sex and gender based analysis (SGBA) to develop, implement and evaluate the Health Portfolio’s research, programmes and policies to address the different needs of men and women, boys and girls”.

This policy applies to the entire Health Portfolio and replaces Health Canada’s Gender-Based Analysis Policy (2000). The Health Portfolio is comprised of the following organisations at this time: Assisted Human Reproduction Canada, Canadian Institutes of Health Research, the Hazardous Materials Information Review Commission, Health Canada, the Patented Medicine Prices Review Board, and the Public Health Agency of Canada.
Goal of the strategy:

This policy, specifically the Health Portfolio application of SGBA on research, policy and programmes, supports:

- a comprehensive understanding of variations in health status, experiences of health and illness, health service use and interaction with the health system
- the development of sound science and reliable evidence that addresses sex and gender health differences between men and women, boys and girls
- the implementation of rigorous and effective research, programmes and policies that address sex and gender health differences between men and women, boys and girls

The goal of the CIHR sex and gender policy is to foster meaningful integration of sex and gender considerations in all research funded by CIHR to facilitate innovative and high-quality research that is rigorous, ethical, and applicable to every person. CIHR encourages and promotes mechanisms to facilitate meaningful integration of sex and gender in its peer review processes. It is the commitment of CIHR to continue building sex and gender capacity across all research theme areas and ensure that trainees, researchers and peer reviewers have the appropriate training resources to enable them to appropriately take up sex and gender considerations in their work.

Implementation of the strategy:

As part of CIHR’s implementation of the SGBA policy, CIHR requires all researchers applying for CIHR grants to respond to mandatory questions on the grant application forms indicating if and how they are integrating sex and/or gender into their research designs. The questions are as follows:

1) Are sex (biological) considerations taken into account in this study? - Yes or No.

2) Are gender (socio-cultural) considerations taken into account in this study? - Yes or No.

If YES please describe how sex and/or gender considerations will be considered in your research design.

If NO please explain why sex and/or gender are not applicable in your research design (2000 characters limit).

Applicants who answer “Yes” are required to provide further explanation on how they are planning to do so. Applicants who answer “No” are required to provide further explanation to justify why not. Applicants cannot proceed with
Every researcher who applies for a CIHR grant is required to indicate how they are taking up sex/gender considerations in their grant proposal and the research project in question.

Evaluation of the policy:

The CIHR Institute of Gender and Health has conducted an evaluation of the uptake of sex and gender by CIHR-funded researchers since the SGBA policy was established in December 2010.

The evaluation analysed the impact of the requirement introduced in December 2010 that all applicants to the Canadian Institutes of Health Research indicate whether their research designs accounted for sex or gender. It aimed to inform research policy by understanding the extent to which applicants across health research disciplines accounted for sex and gender.

The evaluation showed that “the proportion of applicants responding affirmatively to the questions on sex and gender increased over time (48% in December 2011, compared to 26% in December 2010). Biomedical researchers were least likely to report accounting for sex and gender. Analysis by discipline-specific peer review panel showed variation in the likelihood that a given panel will fund grants with a stated focus on sex or gender. These findings suggest that mandatory questions are one way of encouraging the uptake of sex and gender in health research, yet there remain persistent disparities across disciplines. These disparities represent opportunities for policy intervention by health research funders”.

The analysis has enabled CIHR to have a better understanding of sex and gender update by researchers from CIHR’s four health research theme areas, namely: i) Biomedical research; ii) Clinical research; iii) Health systems/services research, and; iv) Population health research. The analysis has provided insights into health research theme areas (and related disciplines) where there is relatively lower uptake of sex/gender considerations and where IGH could focus its sex/gender capacity development endeavours through awareness raising and training.

Impact of the strategy:

Outcomes from the evaluation of the CIHR SGBA policy show a progressive increase in the number of funded researchers – across all the four CIHR pillars – who

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49 Does a Change in Health Research Funding Policy Related to the Integration of Sex and Gender Have an Impact? Joy Johnson, Zena Sharman, Bilkis Vissandjee, Donna E. Stewart, PLOS ONE (June 2014) (http://journals.plos.org/plosone/article?id=10.1371/journal.pone.0099900)
are integrating sex and/or gender into their studies. The main impact of the initiative is that, requiring all applicants to respond to mandatory questions on sex and gender may have contributed to increased attention to sex and gender as key considerations in healthy research, and increase in the uptake of sex and gender across CIHR funded research.

The research funding areas of the CIHR are part of Life sciences. More specifically the area of Health research i.e. biomedical research; clinical research; health systems/services/policy research; population health research.

The official policy statement requiring applicants to funding programmes to specify whether they are considering sex and/or gender in their research design is already commented above (see implementation of the strategy).

The policy is implemented by means of requiring all researchers applying for CIHR grants to respond to mandatory questions on the grant application forms if and how are they integrating sex and/or gender into their research designs. Applicants who answer “Yes” are required to provide further explanation on ‘how they are planning to do so.’ Applicants who answer “No” are required to provide further explanation to justify ‘why not.’ Applicants cannot proceed with their grant application without providing feedback on these questions. Peer reviewers are also notified to take applicants’ responses to the sex/gender questions into consideration when reviewing grant proposals.

Evaluation of the policy

The responses from funded researchers on how they are integrating sex and/or gender in their research designs are analysed to identify trends. An upward trend indicates success. Peer reviewers are also notified to take applicants’ responses to the sex/gender questions when reviewing grant proposals.

CIHR is in the process of finalizing the initial analysis of the data collected since the policy was established four years ago.

Impact of the policy

An initial evaluation of outcomes after the first three grant applications cycles shows a progressive increase in the number of researchers – across all the four research themes – who are integrating sex and/or gender into their studies. The main impact of the policy is awareness rising within the Canadian heath research community about the importance of sex/gender in health research. Requiring all applicants to respond to the mandatory questions on sex and gender may have contributed to increased attention to sex and gender as key considerations in healthy research, and increase in the uptake of sex and gen-
under across CIHR funded research thereby fostering rigorous research and research outcomes that are ethical and equitably applicable to men and women.

5.1.3. Guidelines and Training materials for grant Applicants (GTAs)

CIHR has developed the tool guide *Gender, Sex and Health Research Guide: A Tool for CIHR Applicants*. The purpose of this tool is to give health researchers a framework for thinking through how gender and/or sex might be integrated into their research designs. This tool was launched in conjunction with the mandatory questions for CIHR applicants. It guides applicants into the following areas:

- Research approach
- Research questions and hypotheses
- Literature review
- Research methods
- Ethics

In addition, CIHR is developing on-line training modules that will be tailored to the needs of researchers and peer reviewers. CIHR-IGH, more specifically, is in the process of developing user-friendly on-line sex/gender training modules for researchers that will be available for wider dissemination later in 2015.

5.1.4. Guidelines and Training for grant proposal Reviewers (GTRs)

CIHR has developed the tool guide *Integrating Gender and Sex in Health Research: A Tool for CIHR Peer Reviewers*. The purpose of this tool is to give peer reviewers a framework for thinking whether gender and/or sex are appropriately integrated into CIHR applicants’ proposed research designs. This tool was launched in conjunction with the mandatory questions for CIHR applicants. It guides evaluators into the same areas as the Tool for applicants (see above).

5.1.5. Transnational activities

CIHR is a partner in the GENDER-NET project and a co-leader of WP3, along with MINECO-SEIDI. CIHR was also a co-organiser of the Gender Summit 3 - North America which was held in November 2013 in Washington DC, and has organised two gender and health conferences convened in Canada:

- 2010 Conference: “Innovations in Gender, Sex, and Health Research - Every Cell is Sexed, Every Person is Gendered”, November 22-23, 2010, Toronto, Ontario
- 2012 Conference: “Advancing Excellence in Gender, Sex and Health Research”, October 29-31, 2012, Montreal, Quebec
5.1.6. Other activities

Elaboration of promotional pieces:

1) A short video promoting the importance of sex/gender integration in research\(^{50}\)

2) A slide cast that promotes the importance of sex/gender integration in research\(^{51}\)

3) An online training course on sex/gender integration into health research (to be leased by early fall 2015)\(^{52}\)

5.2 Irish Research Council (IRC)

established in 2012, the Irish Research Council is a merger of two former councils (the Irish Research Council for Humanities and Social Sciences, IRCHSS, and the Irish Research Council for Science, Engineering and Technology, IRCSET). It is an associated agency of the Department of Education and Skills (DES) and operates under the aegis of the Higher Education Authority (HEA).

5.2.1. Policies and strategies aimed at integrating sex/gender analysis in research contents (P/S)

The specific strategy aimed at integrating sex and gender analysis into research content reported by the IRC is its Gender Action Plan 2013-2020.

The IRC Gender Strategy and Action Plan address these two main issues in regard to gender in research:

- The strategy and action plan include both sexes, and aims to provide equal outcomes to both men and women.

- The Council will also only fund excellent research, and excellent research fully considers whether a potential sex and/or gender dimension is relevant to the research content and fully integrates sex/gender analysis where relevant, thereby ensuring maximum impact, societal benefit and optimising innovation in Irish research.

Goals of the strategy:

There are three areas within the plan with specific objectives:

1. Supporting Gender Equality in Researcher Careers:

The Council will encourage and implement initiatives which promote equality between women and men at all stages of the researcher career.

2. Integration of sex/gender analysis in research content:

50 YouTube link: https://www.youtube.com/watch?v=LGiSytha55U

51 As of June 2015. YouTube link: https://www.youtube.com/watch?v=8XEfmUSxEMY&feature=youtu.be

52 As of June 2015
The Council will ensure that researchers have fully considered whether their research contains a sex and/or gender dimension and, if so, that they have fully integrated it into the research content.

3. Internal Gender Proofing

All efforts related to gender equality and inclusion of sex/gender analysis in research content will be a shared, overall task for the organisation as a whole.

Implementation of the Gender Strategy and Action Plan

The Council will ensure that researchers have fully considered whether their research contains a sex and/or gender dimension and, if so, that they have fully integrated it into the research content. The Council will:

- require all applicants to indicate whether a potential sex and/or gender dimension may be present or could arise in the course of their proposed research. If so, applicants will be asked to outline how sex/gender analysis will be integrated in the design, implementation, evaluation, interpretation and dissemination of the results of the research proposal. If not, applicants will be asked to outline why it is not relevant to the research proposal
- facilitate researchers to correctly identify and recognise whether or not there is a potential sex and/or gender dimension in their proposed research through the provision of reference materials and training sessions
- provide guidance and training for Irish based researchers targeting international funding programmes where the sex/gender dimension is a review criterion
- provide guidance and training for Council peer-review assessors in evaluating whether a potential sex and/or gender dimension is present in the proposed research and if so, how well the sex/gender analysis has been integrated into the research content
- include review of the sex and/or gender dimension in the ongoing monitoring and review process of funded research proposals where these have been identified as relevant variables
- partner with international organisations in the GENDER-NET to share lessons learned and utilise best practice in the development of future initiatives to ensure the integration of sex/gender analysis in research content

5.2.2. Research funding programmes aimed at integrating sex/gender analysis in research contents (RFPs)

The IRC Gender Action Plan makes reference to the requirement of applicants to consider sex and/or gender within their proposals. IRC has developed a specific document to support and guide applicants for funding calls for this purpose. The specific question from the application form is the following:
Does your proposed research programme involve any of the following?

1. Humans as the research focus
2. Animals as the research focus
3. Human samples and/or data
4. Humans involved as consumers, users, patients, or in trials
5. Research on animals, animal samples and/or data
6. Research outputs with implications for end users or consumers

If you have answered NO, please explain why there is no potential biological sex and/or gender dimension to be considered in your proposed research.

If you have answered YES, indicate how potential biological sex and/or gender issues will be handled.

Regarding the Internal Gender Proofing, the Gender Strategy and Action Plan also states that the Council will:

- carry out an assessment of existing policies and processes in relation to gender equality in research careers and integration of sex/gender analysis in research content
- implement training measures to enhance competence within the Council on gender equality and the integration of sex/gender analysis in research content
- consult with Irish representatives of national and international groups that are working to advance gender equality and integration of sex/gender analysis in research content

Evaluation of the Gender Strategy and Action Plan

While no specific criteria are specified to measure success of the implementation of the policy, the council requests feedback from stakeholders regarding this. In 2014, such feedback was sought from external reviewers and research officers within higher education institutions. This feedback is then reviewed, with any necessary changes made to the next call.

Impact of the strategy:

The policy was introduced in late 2013 and so is in an early stage of implementation. However it is noted that several other funding organisations have followed the lead of the Council in asking applicants to consider integrating sex and gender into research proposals. For example, the Institute of Technology Ireland (IOTI) Postgraduate Scholarship Initiative included the following text in their 2014 call for applications:
“Applicants will also be asked to set out any gender dimension to the proposed research and how this dimension will be handled. While the response in this regard will not be scored, it must set out, to the satisfaction of the assessment panel, how potential sex-gender issues will be handled or why such a sex-gender dimension does not exist in relation to the proposed research.”

Examples such as this show the impact the Council policy has had on the research funding landscape in Ireland.

The IRC has a Guide for Applicants designed to provide practical information to potential applicants in preparing and submitting an application for either the IRC Postgraduate Scholarship or the IRC Enterprise Partnership Scheme (EPS) Postgraduate Scholarship. In addition, it provides a general overview of the Council assessment process.

Under the section Completing the Personal Statement, Ethics, and Sex/Gender Dimension of this guide (p.28) there is a specific statement aimed at stressing the importance of the integration of sex/gender analysis in the research proposals when appropriate. It also refers to other support toolkits and projects (Gendered Innovations and the Yellow Window toolkit) for further information. The Appendix II of this document is a ‘Guidance on the Sex/Gender Dimension Statement’, which summarizes the Toolkit Gender in EU-funded research.

Since 2013 when the IRC included the necessity for applicants to schemes to consider the sex/gender dimension of their proposals, training has been provided to applicants twice yearly.

The IRC has developed the document Sex/Gender Relevant Text from IRC Call Documentation 2014, which is designed to support and guide applicants and reviewers on how to integrate/assess the sex/gender dimension in proposals. The guide provides support for all the areas and phases of the project cycle (Research ideas and hypotheses, Project design and research methodology, Research implementation and Dissemination phase – reporting of data) and includes a checklist, documents and reference materials. In addition, assessors are briefed in person at assessment panel meetings on the context of the IRC policy to include the assessment of consideration of the sex/gender components of proposals.

53 The document represent a sample of IRC documentation not a definitive statement
54 http://surveygizmoreponseuploads.s3.amazonaws.com/fileuploads/259553/1683565/55-a37c94895e85ec42b8f738dcce98c8c7_2014+IRC+Gender+Relevant+Text+in+Call+documentation.pdf
55 The document represent a sample of IRC documentation not a definitive statement
5.2.5. Transnational activities

IRC is one of the partners in the GENDER-NET project, under their umbrella organisation HEA, and a Leader on several tasks addressing the gendering of research contents.

5.3. US National Institutes of Health (NIH)

The National Institutes of Health (NIH), as part of the Department of Health and Human Services, is the USA’s medical research agency. NIH is the largest source of funding for medical research in the world, made up of 27 Institutes and Centres, each with a specific research agenda, often focusing on particular diseases or body systems. The Office of Research on Women’s Health (ORWH) is part of the Office of the Director of NIH. ORWH works in partnership with the NIH Institutes and Centers to ensure that women’s health research is part of the scientific framework at the NIH — and throughout the scientific community.

5.3.1. Policies and Strategies aimed at integrating sex/gender analysis in research contents (P/S)

NIH is calling on scientists to take a deliberate approach in considering sex in preclinical research to make sure that women and men get the full benefit of medical research, instructing researchers to take sex into account as they develop their research questions, design experiments, analyse data, and report results.

The NIH policy statement states:

“Over the past two decades, we have learned a great deal about how men and women respond differently to medications. This knowledge came after a concerted effort in the early ’90s to increase the number of women in NIH-funded clinical research. Today, just over half of NIH-funded clinical research participants are women. Unfortunately, experimental design in cell and animal research has not always followed suit. An over-reliance on male animals, and neglect of attention to the sex of cells, can lead to neglect of key sex differences that should be guiding clinical studies, and ultimately, clinical practice. NIH is taking action to address this shortfall.”

5.3.2. Implementation of the policy

The implementation of the NIH policy is targeted through different channels:

Website:

NIH’s Studying Sex to Strengthen Science website is regularly updated to reflect the latest information from NIH about this important topic. Highlights include background information, research and training resources, Q&A, a reading room with links to journal articles about studying both sexes, links to media cove-
rage, and growing stories of discovery. Some key programmes and initiatives are listed below and can also be accessed online.

**Request for Information from the research community:**

NIH has been taking a phased approach to developing and implementing policies requiring NIH applicants to consider sex as a variable in biomedical research involving animals and cells. One first step for the policy was to launch a formal *Request for Information* (RFI) from the research community in September 2014. This Request for Information seeks input from the research community and other interested stakeholders on the following topics regarding the consideration of sex as a biological variable in biomedical research. Public comment is sought for but not limited to the following:

- Whether consideration of sex as a biological variable is an issue affecting the reproducibility, rigor, and/or generalizability of research findings
- Areas of science (e.g., cancer, neuroscience) or phases of research (e.g., basic, translational) conducted with animals that have the greatest opportunity or need for considering sex as a biological variable
- Areas of science or phases of research conducted with cells and/or tissues that have the greatest opportunity or need for considering sex as a biological variable
- Main impediments (e.g. scientific, technical, and other) to considering sex as a biological variable in research
- Ways in which NIH can facilitate the consideration of sex as a biological variable in NIH-supported research
- Any additional comments you would like to offer to NIH about the development of policies for considering sex as a biological variable in research involving animals, tissues, or cells

**Workshop on Methods and Techniques for Integrating the Biological Variable Sex into Preclinical Research**

How do you incorporate sex as a variable in research with animals and cells? This question was the focus of an October 2014 workshop hosted by NIH’s ORWH. The workshop was designed to help scientists understand why sex in preclinical research is important, as well as to provide practical guidance on experimental approaches.

**Specialized Centres of Research on Sex Differences:**

57 https://videocast.nih.gov/Summary.asp?File=18686&bhcp=1
The Specialized Centres of Research (SCOR) on Sex Differences programme is an innovative interdisciplinary research programme focusing on sex differences and major medical conditions affecting women. The SCOR programme supports established scientists conducting research at centres across the country that integrates basic, clinical, and translational research approaches to incorporating a sex and gender focus.

Eleven SCOR awards are co-funded by the NIH ORWH and the National Institute on Aging, National Institute of Arthritis and Musculoskeletal and Skin Diseases, the Eunice Kennedy Shriver National Institute of Child Health and Human Development, the National Institute of Diabetes, Digestive and Kidney Diseases, the National Institute on Drug Abuse, the National Institute of Mental Health, and the U.S. Food and Drug Administration (FDA).

SCORs are selected on the basis of having at least three highly integrated, synergistic research projects that explore an important issue related to sex/gender health differences through interdisciplinary approaches. ORWH monitors progress in advancing sex differences research across the centres and coordinates the inter-SCOR interactions. The co-funding NIH institutes manage SCOR programme-related needs.

Administrative Supplements for Research on Sex/Gender Differences:

The NIH ORWH developed the Administrative Supplements for Research on Sex/Gender Differences programme to catalyse exploratory research on sex and gender differences by providing administrative supplements to ongoing NIH-funded research, and announced an investment in supplemental funding to bolster the research of 82 grantees to explore the effects of sex in preclinical and clinical studies in Fiscal Year 2014.

The projects span a wide array of science, including basic immunology, cardiovascular physiology, neural circuitry, and behavioural health. The projects will contribute to greater awareness of the need to study both sexes, demonstrate how research can incorporate sex, and reinforce the value of taking it into account as these studies yield results.

Online Education on Sex and Gender Differences:

ORWH and the US FDA collaborated to develop Online Education on Sex and Gender Differences. This online series of courses provides a foundation for sex and gender accountability in medical research and treatment. After completing the courses, researchers, clinicians, and students in the health professions will be able to integrate knowledge of sex and gender differences and similarities into their research and practice.
The curriculum includes:

- Module I: The Basic Science and the Biological Basis for Sex- and Gender-Related Differences
- Module II: Sex and Gender Differences in Health and Behaviour
- Module III: The Influence of Sex & Gender on Disease Expression and Treatment

Encouraging journal editors and publishers to promote rigorous reporting of sex and gender analyses:

NIH convened a joint workshop in June 2014 with the Nature Publishing Group and Science Magazine on the issue of reproducibility and rigor of research findings, with journal editors representing over 30 basic/preclinical science journals in which NIH-funded investigators have most often published. Journal editors at that workshop came to consensus on a set of principles to facilitate these goals. A joint publication was later issued by Science and Nature in their November 6th 2014 issues, which includes reporting source, species, strain, sex, age, husbandry, inbred and strain characteristics of transgenic animals.

More recently NIH has released important new Guidelines on Consideration of Sex as a Biological Variable in NIH-funded Research. This guidelines focus on NIH’s expectation that scientists will account for the possible role of sex as a biological variable in vertebrate animal and human studies.

58 http://www.nature.com/news/journals-unite-for-reproducibility-1.16259
6. Conclusions

This report presents data and information collected from the GENDER-NET survey in a comparative analysis format that provides insights into existing national/regional policies and programmes as well as related implementation tools, addressing the integration of sex and gender analysis in research and innovation funding structures by selected organizations in Europe and Northern-America. The GENDER-NET survey has been the first to cover this topic specifically in such an in-depth manner, to culminate in this first comparative report - being therefore a pioneer work on a strategic ERA priority.

In this section, the main conclusions from the report are summarized and highlighted as follows:

1) Firstly, an overall conclusion of the survey results is that half of the respondent organisations can be defined as relatively inactive organisations having reported no activity at national level in any of the 5 main survey areas. The remaining half of the respondent organisations can be characterized as ranging from relatively active to proactive organisations. The gap in terms of implemented policies and measures between the proactive and inactive organisations is wide and causes significant differences among peer organisations. The core of proactive organisations has already implemented significant measures and their experience is key to supporting other organisations in their endeavour to promote the integration of the gender dimension in research contents.

2) Secondly, there seems to be no homogeneity on the level of proactivity of organisations, neither within countries nor among types of organisations. This is probably related to the fact that the competence for scientific research and scientific programming is organised differently in each country; in some cases the research funding organisations are research performing organisations are relatively autonomous and can implement their own policies and strategies, while in other countries the relevant ministry is responsible for such measures.

3) Thirdly, the level of implementation follows a descending trend from P/S (40% of the sample), RFPs (28%), GTAs (28%), GTRs (15%) to RCMUCds (3%), which indicates different stages in the implementation process.

The main findings and specific conclusions are presented per main survey area as follows:

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59 It must first be stressed that this sample is not representative of all national organisations at neither the European nor international level, and that the conclusions listed below pertain solely to this sample and should be contextualized. Although the coverage can be perceived as limited, the survey and the report cover all the major players in the field many of which are stakeholders in GENDER-NET.
6.1. Policies and Strategies aimed at integrating sex/gender analysis in research contents

- 40% of the respondents indicated having a policy in place aimed at integrating sex/gender analysis in research contents.
- In terms of policy and strategy development, it appears that the gender dimension in research contents is less developed than gender balance/gender equality in research careers. From the respondents’ answers it can also be concluded that there remains quite some confusion between gender balance/gender equality policies and the gender dimension in research contents.
- The presence of a legal framework prescribing the integration of the gender dimension in research contents is constructive but not a necessary condition to the development of such measures at institutional/organisational level.

6.2 Research Funding Programmes aimed at integrating sex/gender analysis in research contents

27.5% of the respondents indicated having a policy requiring applicants seeking funding to specify whether they are considering sex and/or gender in their research designs.

- At the level of the implementation of this policy two approaches have been identified:
  - Organisations who only integrate gender in research contents requirement in specific programmes
  - Organisations who implement the policy more broadly: gender in research contents requirement being explicitly integrated into all programmes as a cross-cutting question.

6.3 Guidelines and Training Materials for grant Applicants

- 28% of the respondents reported having guidelines and training materials to assist applicants in integrating sex and/or gender into their research designs.
- This indicates that 81% of organisations requiring their applicants to describe how they are considering sex and/or gender into their research designs actually provide the guidelines and training for the applicants to do so, which is rather consistent.

- At the level of the implementation of this policy two approaches have been identified:
  - Organisations who have developed specific, targeted information and guidelines for the applicants
  - Organisations that refer the applicants to existing, more generic, guidelines and training.
Guidelines and Training Materials for grant Proposal Reviewers

- 15% of the respondents reported having guidelines/training for grant proposal reviewers
- This indicates that only 54% of the organisations requiring their applicants to describe how they are considering sex and/or gender in their research designs actually provide the guidelines and training for the reviewers to evaluate this specific aspect. This is not consistent and could affect the quality of the reviews.
- From the responses, it also appears that the link between the integration of sex/gender analysis and scientific excellence is not acknowledged by several of the responding organisations, who refer, for example, to the freedom of research, best practice of international peer review and independence of reviewers as reasons for not having any guidelines/training for grant proposal reviewers.

Recommendations and/or Models for University Curricula Development in scientific and technological fields (other than humanities and social sciences)

- Only 1 out of the 40 (3%) respondent organisations is active in this area, but most of the other ones report not holding a responsibility for university curricula development in scientific and technological fields, it is not possible to draw any conclusions from their answers.
Annex 1. Summary Chart of National Initiatives by Type of Organisation and Level of Proactivity

<table>
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<tr>
<th>Country</th>
<th>Organisation</th>
<th>Type of Organisation</th>
<th>P/S</th>
<th>RFP*</th>
<th>GTAs</th>
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* Organisations (with funding programmes and) with policies requiring grant applicants to specify sex and/or gender considerations in their research designs.
** Group 1: Proactive Organisations, Group 2: Relatively Active Organisations and Group 3: Relatively Inactive Organisations
### Annex 2. List of acronyms

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<thead>
<tr>
<th>Acronym</th>
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<td>Agence Nationale de la Recherche, France</td>
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<tr>
<td>BMWF:</td>
<td>Austrian Federal Ministry of Science, Research and Economy, Austria</td>
</tr>
<tr>
<td>CIHR</td>
<td>Canadian Institutes of Health Research, Canada</td>
</tr>
<tr>
<td>CNRS</td>
<td>Centre National de la Recherche Scientifique, France</td>
</tr>
<tr>
<td>CRUS</td>
<td>Rectors’ conference of the Swiss universities, Switzerland</td>
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<tr>
<td>CSIC</td>
<td>Consejo Superior de Investigaciones Científicas, Spain</td>
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<tr>
<td>DFF</td>
<td>Danish Council of Independent Research, Denmark</td>
</tr>
<tr>
<td>DFG</td>
<td>German Research Foundation, Germany</td>
</tr>
<tr>
<td>DNRF</td>
<td>Danish National Research Foundation, Denmark</td>
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<tr>
<td>FFG</td>
<td>Austrian Research Promotion Agency, Austria</td>
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<td>FNRS</td>
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<td>Austrian Science Fund</td>
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<td>Latvian Council of Science, Latvia</td>
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tion-State Secretariat for Education, Research and Innovation, Switzerland
SFI: Science Foundation Ireland, Ireland
SGL: State General Laboratory, Cyprus
SMM: Ministry of Education and Science of the Republic of Lithuania, Lithuania
SNSF: Swiss National Science Foundation, Switzerland
SRC: Swedish Research Council, Sweden
SU-SAV: Institute for Sociology of the Slovak Academy of Sciences, Slovakia
ZonMw: Netherlands Organisation for Health Research and Development, Netherlands
The GENDER-NET ERA-NET

GENDER-NET is a pilot transnational research policy initiative funded by the European Commission under the Science-in-Society work programme of the 7th Framework Programme for Research and Technological Development (2013-2016).

It is the first ERA-NET (European Research Area Network) to be dedicated to the common challenges still facing European research institutions in achieving gender equality in research and innovation i.e. the persistent barriers and constraints to the recruitment, advancement and mobility of women in the European scientific system, the lack of women in decision-making, as well as the limited integration of the gender dimension in research programmes and contents.

Coordinated by French CNRS, GENDER-NET brings together a balanced partnership of national research programme owners (e.g. ministries, national research funding agencies and other national organisations) as well as a number of Observer organisations, from across Europe and North America, all with a shared commitment to gender equality and synergistic expertise in gender and science issues.

Based on the mutual opening of their respective programmes and policies, partners have joined forces to carry out joint assessments of existing national/regional initiatives, to define priority areas for transnational collaborations and implement a selection of strategic joint activities, in an effort to reduce fragmentation across the ERA and help reach a critical mass of ministries, research funders, universities and research institutions across Europe engaging in the implementation of gender equality plans or related initiatives and fostering the integration of sex and gender analysis in research contents.

For more information, please visit our website: www.gender-net.eu

Graphical design: Syntexte