



MSCA-NET

## POLICY-BRIEF: GENDER EQUALITY

Deliverable 3.11

---

NETWORK OF THE MARIE SKŁODOWSKA-CURIE ACTIONS NATIONAL CONTACT POINTS

---

Task 3.6	Policy Briefs
Issued by:	UKRI-UKRO
Issued data:	09 June 2023
Work Package Leader:	InnovationAuth (IL)

---

## TABLE OF CONTENT

<b>Introduction.....</b>	<b>2</b>
<b>Introduction to Gender Equality in Horizon Europe and MSCA .....</b>	<b>2</b>
Gender equality in Horizon Europe.....	2
New provisions.....	3
<b>Gender equality under the MSCA .....</b>	<b>3</b>
What are the requirements under MSCA? .....	3
<i>Explicit evaluation criteria</i> .....	3
<i>Gender dimension of research</i> .....	3
<i>Applicants are encouraged to think about:</i> .....	4
<i>Developing skills and enhancing long term employability for staff and researchers</i> .....	4
Beneficiaries must have a gender equality plan .....	4
Ensuring equality during project implementation .....	5
References and Resources .....	6
.....	<b>6</b>

### Introduction

This policy brief aims to provide a short, but comprehensive overview of the European gender-related policy objectives and how these have feed into shaping Horizon Europe. The brief aims to help researchers and organisations better understand the policy objectives in the context of the Marie Skłodowska-Curie Actions.

The brief is not intended to duplicate or otherwise replace existing EU guidance and will bring the different information sources together and provide direct signposting to the most relevant resources.

### Introduction to Gender Equality in Horizon Europe and MSCA

Gender equality is a fundamental value of the European Union. Gender inequalities continue to persist, despite significant progress. The ongoing imbalance prevents European research and Innovation systems from reaching their full potential. Addressing issues of gender equality can lead to a better understanding of societal needs and to rethinking gender norms and stereotypes, thereby contributing to a more gender equal society. Addressing issues related to gender inequalities is a crucial factor in the achievement of the UN Sustainable Development Goals<sup>1</sup>, an inclusive economy that works for all<sup>2</sup> and in obtaining sustainable economic growth. It is therefore important that the gender perspective is included in all global challenges, including those addressed by the five EU Missions<sup>3</sup> (Adaptation to Climate Change, including Societal Transformation; Cancer; Healthy Ocean, Seas, Coastal and Inland Waters; Climate-Neutral and Smart Cities; Soil Health and Food).

The EU Missions must relate to society and citizens' needs and deliver solutions to global challenges. Co-designed with the Member States and stakeholder, they also include close involvement of citizens and a wide range of stakeholders. They are bold and inspirational and are expected to solve these challenges within a defined timeframe. As such they will be subjected to transparent, gender-responsive robust monitoring and evaluation system.

Including gender and sex analysis in research stimulates innovation, enhances the societal relevance of the knowledge, technologies and innovations produced, and encourages the rethinking of standards and reference models. It also supports the development of new perspectives and stimulates new questions.

### Gender equality in Horizon Europe

Building on the achievements of Horizon 2020, Horizon Europe aims to eliminate gender inequalities and intersecting socio-economic inequalities throughout research and innovation systems, including those based on disability, ethnicity, and sexual orientation. The 'Regulation establishing Horizon Europe', the 'Specific Programme Implementing Horizon Europe' and the '2021-2024 Strategic Plan' each explicitly include provisions to address gender inequalities and enhance work-life balance. As a cross-cutting priority in Horizon Europe, it concerns all programme parts and must be integrated throughout all stages of the research lifecycle. Citizen engagement related activities should also be gender-responsive and socially inclusive.

---

<sup>1</sup> <https://sdgs.un.org/goals>.

<sup>2</sup> <https://www.oecd.org/inclusive-growth/#introduction>

<sup>3</sup> [https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe\\_en](https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe_en)

## New provisions



## Gender equality under the MSCA

The Marie Skłodowska-Curie Actions (MSCA) programme actively promote and support equality, diversity, and inclusion throughout the various types of funded actions by ensuring gender and family friendly funding conditions. The measures include:

Under Horizon 2020, 42% of all MSCA fellows were women, and they were more successful than men when applying for an Individual Fellowship.

Source: [EURAXESS](#)

- equal pay,
- a dedicated family allowance,
- flexible part-time working arrangements,
- a special needs allowance,
- a long-term leave allowance, and
- maternity/parental leave in line with host organisation's national rules.

As set out in the 'MSCA Work Programme 2023-2024', all MSCA funded projects are encouraged to support diversity, and take measures to address gender and disability related barriers to mobility.

### What are the requirements under MSCA?

#### *Explicit evaluation criteria*

##### *Gender dimension of research*

Applicants must actively consider the gender dimension and intersectionality of research and innovation content. As part of the evaluation criteria, all applicants to Horizon Europe, including MSCA, are expected to address gender under the '**excellence criterion**' in **part B1 section 1**.

Gender, equality, diversity, and inclusion should be considered when addressing dissemination, exploitation, impact, and implementation as well.

Applicants are encouraged to use gender inclusive language and to not think about gender in binary categories, as sexual orientation and gender identity are important. Applicants should also take into consideration other interconnected categories such as race, class, age, etc.

---

### Gender as an evaluation tiebreaker

*As outlined in the 'MSCA 2023-2024 Work Programme' the **gender balance will be considered for equally ranked proposals during the evaluation process***

*If a distinction between equally ranked proposals still cannot be made, there will be **further prioritization based on gender dimension and other diversity aspects of the research activities.***

---

*Applicants are encouraged to think about:*

- ✓ Are gender norms embedded in the concepts, theories and models used by your research field? If so, how do these gender norms/assumptions influence the research area?
- ✓ How do gender and interconnected social categorizations, such as race, class etc. shape your research question and desired outcomes?
- ✓ Do the chosen methodology(ies) ensure that gender, and other connected social characterizations, are considered and investigated?
- ✓ Have you explained the project's approach to gender and intersectionality throughout the research life cycle?
- ✓ Have you explained how including sex and gender findings will increase the quality of the research and enhance the impact and relevance of the results?

*Developing skills and enhancing long term employability for staff and researchers*

Beneficiaries and individual researchers are encouraged to think critically about gender and diversity when outlining their training, mentoring and career development needs, as these aspects are evaluated under the MSCA. The novelty of the research training must be detailed under the **'excellence criterion' in Part B1 section 1**. Gender and diversity are also considered under this criterion regarding the researchers' selection and recruitment process foreseen by the beneficiary, if relevant. Measures to enhance the career perspectives and employability of staff and researchers as well as contributing to their skills development must be addressed under the **'impact criterion' in Part B1 section 2**.

Additional resources and/or training for those involved in supporting and/or implementing the project may be necessary to help address issues related to gender and intersectionality. Under the MSCA, the associated costs can be claimed from the institutional unit costs.

Gender, diversity, and inclusiveness are also determining factors not only when assessing the methodology of the proposal, but also the quality and credibility of the training programme proposed. These aspects must be detailed under the **'excellence criterion' in Part B1 section 1**.

**Beneficiaries must have a gender equality plan**

One of the novelties in Horizon Europe is the requirement that legal entities applying for funding (eligibility criterion) will need to have a Gender Equality Plan (GEP) if they are public bodies, research organisations or higher education establishments established in Member States or countries associated to Horizon Europe to ensure sustainable institutional change. The requirement has been in place for all Horizon Europe calls that have had a deadline after 1 January 2022. GEPs are a tool to establish and priorities concrete objectives, and actions, to improve the gender equality through institutional and cultural change in research and innovation (R&I) organisations. Further details can be found in the 'Horizon Europe Guidance on Gender Equality Plans'.

Organisations are encouraged to consider as institutional policy these 5 areas in their GEP's:

- 1) Improve work-life balance and organisational culture.
- 2) Gender balance in leadership and decision-making.
- 3) Gender equality in recruitment and career progression.
- 4) The integration of the gender dimension in research and teaching content.
- 5) Measures against gender-based violence including sexual harassment.

## GENDER EQUALITY PLAN – 4 MANDATORY REQUIREMENTS

<b>1. Public documentation</b> •A formal, signed document by management and published on the institution's website	<b>2. Dedicated resources</b> •Have dedicated resources and expertise in gender equality to implement the plan	<b>3. Data collection and monitoring</b> •Organisations must collect sex/ gender disaggregated data on personnel, and students (where relevant), with annual monitoring and reporting based on indicators	<b>4. Training</b> •Include awareness-raising and training actions on gender equality engaging the whole organisation
---	---	--	--

### Ensuring equality during project implementation

MSCA beneficiaries should aim for a balanced participation of women and men. They are expected to take all measures to promote equal opportunities during the implementation of the action, if necessary, corrective measures should be implemented.

<b>Recruitment</b>	Doctoral Network and COFUND	<ul style="list-style-type: none"> <li>Beneficiaries must ensure, gender balance, as much as possible, within the recruitment team.</li> <li>Other diversity issues should also be considered to select, promote and recruit an open and inclusive cohort of researchers.</li> <li>Beneficiaries are required to report on the gender of applicants, those involved in the recruitment process and recruited researchers.</li> </ul>
<b>Working Conditions</b>	All MSCA actions	<ul style="list-style-type: none"> <li>Beneficiaries must make sure that recruited researchers and staff members are aware of their rights, including against harassment and violence based on gender, sex, sexual orientation, disability, ethnic background, and age.</li> <li>Researchers and staff must be made aware of the MSCA specific measures to promote and support equality, diversity, and inclusion.</li> </ul>
<b>Management and Leadership</b>	Staff Exchanges, Doctoral Networks, and COFUND	<ul style="list-style-type: none"> <li>The consortium should strive for an equal balance of women and men in management and leadership positions.</li> <li>Consideration for a balanced team should be extended to associated partners and others supporting the implementation of the project.</li> </ul>
<b>Activities and researchers involved</b>	MSCA and Citizens	<ul style="list-style-type: none"> <li>Beneficiaries should ensure that the activities promote gender balance and inclusiveness in science in terms of planned activities and researchers involved</li> </ul>

## References and Resources

- **Horizon Europe and MSCA**
  - [Regulation establishing Horizon Europe](#)
  - [Specific programme implementing Horizon Europe](#)
  - [Horizon Europe Strategic Plan \(2021-2024\)](#)
  - [MSCA Work Programme 2023-2024](#)
  - [Gender equality: a strengthened commitment in Horizon Europe](#)
  - [Horizon Europe Programme Guide](#)
  - [Understanding Gender Dimension for MSCA Projects \(Video\)](#)
  - [The European Research Area \(ERA\)](#)
- **Developing gender equality plans**
  - [Horizon Europe guidance on gender equality plans](#)
  - [EC FAQs on Gender Equality Plans \(GEPs\)](#)
  - [EC Gender Equality Plan training](#)
  - [Gender Equality in Academia and Research \(GEAR\) tool](#)
  - [The ACT project](#)
  - [GE Academy](#)
- **Addressing gender and intersectionality in a research and innovation proposal**
  - [Gender Innovations](#)
  - [Gender Action Plus](#)
  - [GenPORT](#)
  - [Horizon Europe Programme Guide](#)
  - [The MSCA-NET handbooks](#)
- **Addressing gender-based violence & harassment in research performing organisations**
  - [UniSAFE](#)
- **EU Gender Policy**
  - [EU Gender Equality Strategy 2020-2025](#)
  - [Gender Equality in Research and Innovation](#)
  - [EU Award for Gender Equality Champions](#)