

Helpful questions for analysing gender aspects in research projects

Why you should consider gender aspects

The consideration of gender aspects is one key to a winning grant proposal. The European Commission follows a strict policy here: “Under Horizon Europe the integration of the gender dimension into R&I [Research and Innovation] content is mandatory, unless it is explicitly mentioned in the topic description...” This policy also includes that public bodies, research organisations or higher education establishments are required to have published a gender equality plan in order to be eligible for funding from 2022 onwards (Horizon Europe – Work Programme 2021-2022 General Annexes https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-13-general-annexes_horizon-2021-2022_en.pdf , p. 12-13). Furthermore, gender balance among the personnel named in the proposal may be used as a factor for prioritisation if proposals achieve the same scoring in the evaluation process (Horizon Europe – Work Programme 2021-2022 General Annexes https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-13-general-annexes_horizon-2021-2022_en.pdf , p. 23). The DFG also showed the importance of gender aspects by adding a new and related section to the proposal templates in November 2020.

Gender aspects in a research project have two dimensions: Gender aspects within the research project itself and gender aspects on organisational level of the host and partner institutions.

Within the research project gender aspects may play a role in

- Your personal relation with your research project: How is it influenced by your sex and gender? Is there a potential bias in the way how you phrase your research questions or design your project? Would a researcher of a different sex or gender phrase or design them differently?
- The “object” of your research: What sex and gender does your research “object” have? Which requirements does this pose for the research design?
- The way, how you implement your research: How exactly can you uncover sex and gender aspects? What does it take so that the results you obtain with respect to sex and gender are

valid and representative? What does it take so that you level potential biases by your own sex or gender?

- The results themselves: How might they differ depending on sex and gender?
- The research outputs: How can you design your outputs in such a way, that different sex and gender will benefit equally?
- The outcome and/or impact: Which differences are there due to different sex or gender in the opportunity to benefit from your research results? Are there differences in the different gender getting access to your research outputs? How exactly are you going to take this into account in your dissemination activities?

If you have analysed gender aspects in your research design and you arrived at the conclusion, that there are none, explain this in detail in the respective chapter. Gender aspects need only to be considered, if they are relevant.

See also:

- EC - Gendered Innovations 2 https://ec.europa.eu/info/news/gendered-innovations-2-2020-nov-24_en
- EC - Gendered Innovations 2: How inclusive analysis contributes to research and innovation (November 2020): https://ec.europa.eu/info/publications/gendered-innovation-2-how-inclusive-analysis-contributes-research-and-innovation_en
- EC - Gendered innovations factsheet: <https://op.europa.eu/en/publication-detail/-/publication/667d9e3e-2e03-11eb-b27b-01aa75ed71a1/language-en>
- DFG - Relevance of Sex, Gender and Diversity in Research https://www.dfg.de/en/research_funding/principles_dfg_funding/diversity_dimensions/index.html
- DFG Checklist https://www.dfg.de/download/pdf/foerderung/grundlagen_dfg_foerderung/vielfaeltigkeitsdimensionen/checkliste_en.pdf

Methods and case studies

You will find general and field specific methods for sex and gender analysis with case studies from different fields of research in this document:

- EC - Gendered Innovations 2: How inclusive analysis contributes to research and innovation (November 2020): https://ec.europa.eu/info/publications/gendered-innovation-2-how-inclusive-analysis-contributes-research-and-innovation_en

In the following sections however, you will find a selection of helpful open questions you can ask yourself during the design of your research project. As it is a general collection, not all questions will be useful in your field of research. Some are intended to challenge you, and others are intended to make you think about your own contribution to gender equality by maybe putting a little more effort into making the work of female researchers more visible. At the end you will need to decide yourself which ones will improve the scientific excellence of your research design and the quality of your proposal. Just select those, which make sense to you, and then explore them further, by asking yourself more specific open questions.

Question your own perspective on your research topic

- How can my own sex or gender influence the way I am looking at my research question or objective?
- How can my own attitude to sex and gender equality influence the way how I design and implement my research project?
- Which aspects of how I consider my research topic do I take for granted? Which ones could be perceived or seen differently by another sex, gender, cultural or whatever background?
- Which experiences in my own biography might influence my style of project design and the formulation of my proposal?

Questioning the state-of-the-art, references, and existing sources

- How does my selection of references integrate gender equality among cited authors? If it does not, what exactly is the reason for this?
- How did the references reflect and integrate sex and gender analysis in their original work?
- Was the methodology appropriate to uncover sex and gender differences or to show that they are not relevant?
- What exactly was not considered from your point of view?
- Do algorithms and tools for analysis put a bias or merge data with respect to different sex or gender? How do they do so? What exactly is needed to work around this?
- How does the design of a database or survey make sure that there is no bias to a specific sex or gender?

- How does the selection of sources, case studies etc. put an unconscious bias with respect to sex or gender?
- Which sources do I need to be able to give equal space to different sex or gender in my research project?

Questioning methods

- How exactly do my methods allow me to uncover sex and gender aspects?
- What exactly needs to be added to allow me to uncover sex and gender aspects?
- On the basis of what exactly do I recognize whether the approach, model, simulation, tool, method or whatsoever has an integrated bias towards one sex or gender?
- How will I uncover/mitigate unconscious assumptions about something being of one sex or gender in my surveys, interviews, ...?
- What do I have to do to make sure, that there will be enough data with respect to the different sexes or gender?
- How do I make sure, that there are no sex or gender biases in the selection of experts, participants, layperson researchers, stakeholders, target groups or whatsoever?
- How does the design of participatory research or the integration of stakeholders provide equal opportunities to the different sex/gender to express their needs/opinions/interpretations?
- How are probands, animals, participants, layperson researchers influenced by the gender of the project staff, that is responsible for them? What have I integrated in my methodology to be able to uncover this?
- How do I consider cross influences between different aspects?

Questioning research location and restrictions?

- Which sex and gender biases might be introduced by the selection of the field site, epochs, geographical locations, places of research, selection of case studies, documents, sources of information etc.?
- How do the assumptions taken allow for or impede sex and gender equality?
- How do restrictions create a sex or gender bias in the project? What is required to undo the bias?

Questioning assumptions and requirements

- Which conscious or unconscious assumptions with respect to sex and gender led to the formulation of the research questions, hypothesis, objectives, aims, goals?

- Which conscious or unconscious assumptions with respect to sex and gender led to the information/data that you are going to use in your project?
- How does the choice of use cases or case studies allow for assessing sex and gender needs and issues?
- How do you ensure that the methodology on which you assess the requirements to the project objective allows to uncover sex and gender specific needs and issues?
- Which potential sex and gender specific needs and issues of potential users should be considered already in the implementation of the research project?

Questioning research result and research output

- Which sex and gender aspects might be part of the potential research results? (This is especially important in open research questions)
- How exactly do you ensure, that the analysis allows for uncovering sex and gender aspects?
- How exactly do you ensure, that there is enough data with respect to the different sex and gender aspects to achieve significant results?
- On the basis of which assumptions do you relate specific parts of the result to a specific sex or gender?
- How exactly will your research result reflect on sex and gender aspects?
- How exactly will it fulfil the different needs of different sex or gender with respect to the result?
- How exactly do you ensure that the narrative of your research result is a narrative without sex or gender bias?
- How does your research result take intersectionality such as overlapping or intersection categories like gender, sex, ethnicity, age, socioeconomic status, sexual orientation, geographical location etc. into account?
- How do you ensure, that the intersectionality that you uncover is the true intersectionality?

Questioning outcome and impact

- Which sex or gender needs could relate to the documentation and usage of your results?
- How exactly do you consider potential end-users' sex or gender related needs or aspects in the way how you make your results accessible?
- What are the sex and gender specific needs with respect to the dissemination tools and communication channels?
- What are the sex and gender specific needs with respect to accessibility of research results?

- How do you ensure, that your research output is not going to counteract or sabotage gender equality?

Questioning the organisation of the work

- How do you ensure gender equality in the staff working on your project?
- How do you ensure relevant input from different gender in participatory research?
- How do you ensure gender equality in steering committees, among supporting scientists, advisory groups etc?
- How do you ensure gender equality in the decision making in the project?
- How do you deal with gender aspects in cases of conflicts?
- How do you consider different needs with respect to supervision?
- How do you ensure gender equality in the quality of supervision, PhD advisory committees, PhD committees?
- How do you ensure gender equality in the management of intellectual property and the exploitation of it?
- How do you ensure gender equality in the accessibility of networks and networking opportunities?

Questioning the budget

- How does the budget reflect gender equality in the organisation of the work?
- How does the budget reflect the integration of sex and gender aspects in the research design? Is it well justified?
- Which resources for equality measures are being considered?
- How does the intended distribution of resources for publishing take into account gender equality?
- How do resources for the dissemination and exploitation of research results meet up with the needs to integrate sex and gender needs?

Questioning the host institution

- How are the gender equality measures being implemented in reality?
- How are the different gender needs with respect to working times, working place, environment being satisfied?
- How is gender equality in the accessibility of resources, facilities, further training and qualification, career opportunities, responsibility, decision making etc. implemented in reality?

- How is gender equality being lived up to?
- How are gender aspects being integrated in research and teaching in practice?
- How is gender equality being lived up in opportunities on permanent position, further support, further collaboration?
- How is gender equality being lived up in the support for gaining visibility?

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