



INSPIRE

Support Package 5

**Inclusive Gendered Innovation Policies -
Improving Quality and Equality in
Research and Innovation**

For Research Funding Organisations

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31 July 2025



Funded by
the European Union

Project no.	101058537
Project acronym:	INSPIRE
Project title:	INSPIRE: Centre of Excellence on Inclusive Gender Equality in Research & Innovation: Creating Knowledge & Engaging in Collaborative Action
Call:	HORIZON-WIDERA-2021-ERA-01
Start date of project:	01.10.2022
Duration:	48 months
Deliverable title:	SPkg 5: Inclusive Gendered Innovation (Policies) - Improving Quality and Equality in Research and Innovation – For RFOs
Due date of deliverable:	NA
Actual date of submission:	31.07.2025
Deliverable Lead Partner:	Joanneum Research
Dissemination level:	Public

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Consortium

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Document History			
Version	Date	Summary of changes	Revised by
01	15.06.25	First draft	David Walker
02	31.07.25	Changes of Quality Assurance Editors integrated	David Walker
03	13.05.26	Changes based on SPkg evaluation integrated	David Walker

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1. Introduction: Better Research. Smarter Innovation. Greater Impact

Researchers, innovators and funders are increasingly expected to **ensure that research and innovation respond to diverse societal needs**. Yet many projects still overlook differences in user experience, access, and impact. This can limit the relevance, reach, and quality of outcomes.

Support Package 5 (SPKg 5) aims to help **researchers, innovators, and research funding organisations (RFOs)** to integrate gender and diversity into their research and innovation content. Its focus lies on Inclusive Gendered Innovation (IGI) - the integration of sex, gender, and diversity dimensions into research questions, methods, design and impact.

It offers a practical roadmap for **making research and innovation more inclusive, responsible, and effective** at every stage of the research and innovation process as well as in funding procedures.

Whether you're writing a proposal, designing a project, or shaping funding policy, SPK 5 equips you with the tools, methods, and real-world examples you need to do it inclusively.

Developed within the [INSPIRE](#) project, this package brings together practical insights from research, case studies, and peer exchange.

Who is it for?

- **Researchers and innovators** aiming to integrate gender and inclusion
- **Proposal writers** preparing applications for funding
- **Research funding organisations**, aiming to develop and implement inclusive policies and indirectly also
- **Evaluators** assessing research and innovation projects
- **Policy-makers** promoting inclusive research and innovations
- **Institutions** working to strengthen equality across research and innovation systems

What's inside?

- **Step-by-step guidance for researchers and innovators** along the research and innovation cycle
- **Modular guidance for funding organisations and their staff**, structured around the funding cycle
- **Lessons learned** from research within INSPIRE and INSPIRE's Community of Practice
- **A glossary of key terms** to clarify concepts like sex, gender, diversity, and Inclusive Gendered Innovation (IGI)

- **Carefully curated resources**, including tools, templates, and examples to support hands-on implementation
- **Strategies to support long-term change in the research ecosystem**, such as inclusive policy design and capacity-building approaches
- **The package is flexible and can be adapted to your needs**. You can select the parts most relevant to your organisation.

1.1 How to use this Support Package: A quick orientation for Research Funding Organisations

This Support Package is designed as a flexible guide. You do not need to read it from beginning to end. Use the table below to find the sections most relevant to your current work.

If you want to...	Start here
understand what Inclusive Gendered Innovation means and why it matters, and make the case for it in your organisation	Introduction: key terms, relevance, and challenges
build internal foundations and create the conditions for inclusive policies	Step 0: Getting Started
integrate IGI into your funding programmes and budget planning	Step 1: Programming and Budget Allocation
design inclusive calls that embed gender and diversity expectations	Step 2: Designing Inclusive Calls
develop guidance and support for applicants	Step 3: Applicant Guidance and Support
select reviewers and compose evaluation panels	Step 4: Reviewer Selection and Panel Composition
brief reviewers and develop inclusive evaluation criteria	Step 5: Reviewer Briefing and Evaluation Criteria
ensure the assessment process and decision-making are fair and inclusive	Step 6: Assessment Process and Decision-Making
provide transparent funding decisions and feedback	Step 7: Funding Decisions and Feedback
monitor progress and report on IGI integration across your funding cycle	Step 8: Monitoring and Reporting
build in reflection loops and support long-term learning	Step 9: Learning and Continuous Improvement
clarify concepts such as sex, gender, diversity, intersectionality, IGI, or IGIP	Glossary

1.2 Glossary of Key Terms

Not sure about the difference between gender and sex? Wondering what terms like intersectionality or SG&DA really mean? The glossary in **chapter 4** provides a **shared vocabulary** to help users of this Support Package navigate the concepts and practices of Inclusive Gendered Innovation. This glossary draws on academic literature and was developed with input from INSPIRE's RFO Community of Practice.

You will find:

- **Clear definitions** of core concepts used throughout this package (e.g. sex, gender, diversity, innovation)
- **Frameworks and tools** such as SG&DA, Inclusive Gendered Innovation (IGI), and Inclusive Gendered Innovation Policies (IGIPs)
- A **brief guide to terms** often confused or misused such as **equality vs equity**, or **diversity vs inclusion**

The glossary supports:

- **Researchers and innovators**, to understand requirements and best practices
- **Funders and evaluators**, to apply concepts consistently across applications and reviews
- **Policy makers and institutions**, to promote a shared understanding of inclusive research quality

You can access the full glossary:

- **In the Annex of this PDF**
- Or as a **downloadable resource** at www.inspirequality.eu

1.3 WHAT is Inclusive Gendered Innovation

Inclusive Gendered Innovation

Means integrating sex, gender, and diversity considerations into research and innovation processes. It aims to produce results that are more **inclusive, relevant, and effective** by recognising how different people experience problems, use technologies, and benefit from new knowledge.

Adapted from the INSPIRE Glossary and D2.1 Report (Karaulova et al., 2023)

Often, innovation is designed for a **“standard” user** - usually male, able-bodied, and from a majority background. This leads to **products that don't work for everyone, research that misses key questions, and solutions that leave people out.**

The framework of Inclusive Gendered Innovation challenges this by asking:

- **Who is this innovation for?**
- **Who is being left out? Whose voices, needs, or experiences are missing?**
- **How can they best be included?**

The Inclusive Gendered Innovation approach aims to:

- improve the **quality and usability** of outcomes
- avoid **blind spots and costly design failures**
- make innovations **more responsive to real-world conditions**
- strengthen trust, uptake, and long-term impact of research outcomes

Inclusive Gendered Innovation can involve **practical steps**, such as:

- **considering sex, gender, and other diversity factors** at each stage of a project, from setting goals to sharing results
- **questioning assumptions** in research questions, methods, data, and decisions
- **using data** that shows how different groups may experience a problem or benefit from a solution
- **involving a variety of people** (e.g. user groups) in identifying needs, shaping and testing ideas
- **designing studies, products, or services** that respond to different user needs
- **being aware of routines or norms** in research and innovation that might exclude certain groups
- **checking whether results work** for different people and making improvements where needed

Not every project will apply all of these steps at once. Even focusing on one or two, such as involving users earlier in the process or checking whether results work equally well for different groups, can make a real difference.

1.4 WHAT are Inclusive Gendered Innovation Policies?

Inclusive Gendered Innovation Policy

Means embedding sex, gender, and diversity considerations into the policies, procedures, and funding mechanisms that shape research and innovation. These policies support more inclusive, fair, and effective research by creating institutional conditions that enable change.

Adapted from the INSPIRE Glossary and D2.1 Report (Karaulova et al., 2023)

To make Inclusive Gendered Innovation work in practice, we also need supportive **policies and frameworks**.

This is where **Inclusive Gendered Innovation Policies (IGIPs)** come in. IGIPs provide a practical way to make inclusion systematic and sustainable. They are especially important for **research and innovation funders**, which set the priorities, rules, and expectations that shape research systems.

Inclusive Gendered Innovation Policies (IGIPs) can be implemented by funders to embed gender and diversity into their programmes and funding procedures. Inclusive Gendered Innovation Policies (IGIPs) are used by funders to embed gender and diversity into their programmes and funding procedures. The way IGI is applied varies across organisations: in some RFOs it is a mandatory requirement across all calls, while in others it is introduced in selected programmes or pilot initiatives. This package supports both starting points

Well-designed IGIPs help to:

- **set clear expectations for inclusive research and innovation**
- **integrate IGI into application and evaluation criteria**
- **provide guidance and training** for applicants, reviewers, and programme staff
- **monitor outcomes** and support continuous learning and improvement

These elements help funding organisations provide consistency, support, and accountability. With IGIPs in place, inclusive innovation becomes not just an option, but a **standard for quality and fairness** in science and technology.

In short:

- **Inclusive Gendered Innovation** is about doing better science and innovation by including the realities of all people, not just the few.
- **IGIPs** create the institutional conditions that make this possible. They turn inclusion into a shared standard by setting expectations, building capacity, supporting evaluation, and creating space to learn and improve.

1.5 WHY are Inclusive Gendered Innovation relevant for different stakeholder groups?

Inclusive Gendered Innovation is not just about doing what is fair. It is about **doing what works**. By recognising how people's experiences differ across gender, age, background, and other factors, innovation becomes **more useful, robust, and impactful**. Whether in research, policy, or product design, applying this perspective improves outcomes for users, strengthens institutions, and helps ensure that public and private investments lead to lasting value.

The relevance of Inclusive Gendered Innovation becomes clear when we look at its benefits across different parts of the research and innovation ecosystem from businesses and research teams to funders and society as a whole.

For Companies

Better products. Broader markets. Lower risks. Stronger returns.

Inclusive Gendered Innovation helps businesses create **products and services that actually work for the people who use them**. When innovation is built around a narrow idea of the user, it often leads to **missed market opportunities, reduced performance, and even costly failures**.

By considering gender and other aspects of user diversity, companies gain a more accurate view of **real-world needs and behaviours**. This leads to **smarter design choices, higher usability, and stronger market fit** across industries such as health, mobility, consumer goods, and digital technologies.

Inclusive Innovation can

- **open up new markets** by designing for underserved user groups
- **reduce failure rates and redesign costs** by addressing risks early
- **increase customer trust and brand loyalty**
- **improve compliance** with public procurement and Environmental, Social, and Governance (ESG) standards
- **foster more creative and adaptive innovation processes**

Using inclusive methods such as participatory design and norm-critical analysis helps companies challenge hidden assumptions and unlock fresh perspectives. These methods are practical, proven, and increasingly expected by funders, investors, and regulators. To apply them effectively, companies benefit from **multidisciplinary teams** that combine technical know-how with skills in **user research, inclusive design, and social analysis**. These teams are better equipped to deliver innovation that performs well in real markets and earns lasting credibility.

For companies it is key to understand that Inclusive Gendered Innovation is not a niche concern. It is a **strategic asset** that strengthens product quality, market resilience, and long-term value.

For Researchers

Stronger research. Higher impact. Better funding results

Inclusive Gendered Innovation supports researchers in producing work that is **more relevant and widely recognised**. It improves how research questions are framed, how data is collected and interpreted, and how findings translate into real-world solutions.

Including sex, gender, and diversity dimensions from the start helps uncover **hidden patterns, overlooked risks, and new opportunities for insight**. It also increases the chances of receiving funding, especially in programmes like **Horizon Europe**, where inclusive approaches are part of the excellence criteria. In a growing number of funding organisations, integrating

gender and diversity is no longer optional: **it is a requirement that applies across all calls.** Engaging with inclusive approaches therefore helps researchers meet both programme-specific and institutional expectations.

Inclusive Innovation can:

- **strengthen research design** by reducing bias and blind spots
- **increase the relevance and uptake** of results across different user groups
- **improve success rates in funding applications** through better alignment with policy goals
- **encourage interdisciplinary thinking and intellectual curiosity**
- **support ethical, responsible, and socially engaged research practices**

Inclusive approaches are especially valuable in areas where user needs vary such as health, digitalisation, climate, and mobility but they are increasingly relevant across all fields. Researchers who use tools like **Sex, Gender, and Diversity Analysis (SG&DA)** not only enhance the quality of their work, they position themselves at the forefront of responsible innovation.

It is important to keep in mind that Inclusive Gendered Innovation is not about adding complexity for its own sake. It is about asking sharper questions, using better methods, and delivering results that matter to broader segments of society.

For Research Funders

Stronger funding outcomes. Greater accountability. Alignment with EU priorities.

Research and Innovation funders are key to shaping the direction, quality, and impact of research and innovation. By integrating Inclusive Gendered Innovation into programme design, funding calls, and evaluation criteria, they strengthen both scientific outcomes and the public value of their activities.

Inclusive Gendered Innovation provides RFOs with practical tools to support research that is more inclusive, relevant, and responsible. It helps ensure that proposals consider real-world diversity and that funding decisions promote a broader concept of excellence in method and impact.

Funders that embed inclusive approaches can:

- **improve the quality of proposals by encouraging more robust and thoughtful research design**
- **promote fairness and responsibility in the funding process**
- **comply with EU policy frameworks, including Horizon Europe's requirements for sex and gender analysis**
- **increase the societal relevance and uptake of funded projects**
- **support internal learning and continuous improvement**

Inclusive Gendered Innovation also helps shift how research quality is assessed: When

reviewers are trained to recognise intersectional gender analysis, evaluations become more comprehensive, leading to better-informed funding decisions and stronger outcomes.

Inclusive Gendered Innovation Policies make this change actionable. By implementing them, funders can offer clear expectations, ready-to-use tools, and structured processes to embed inclusion into funding systems in a consistent and effective way.

By taking this approach, funders raise the bar for excellence, increase the impact of their investments, and contributing to building a more inclusive research ecosystem.

For Society

More just innovation. Greater public trust. Stronger societal impact.

Inclusive Gendered Innovation helps ensure that science and technology benefit the full diversity of people they are meant to serve. By addressing real-life experiences and inequalities from the start, it contributes to solutions that are **more ethical, accessible, and effective**.

When innovation overlooks certain groups, it can lead to harmful consequences. This includes medical tools that fail to detect conditions in women, transportation systems that ignore the needs of caregivers, or algorithms that reproduce social bias. Inclusive approaches prevent these outcomes by recognising that different people experience problems and solutions in different ways.

At a societal level, Inclusive Gendered Innovation can:

- **reduce inequality between social groups by designing for more equitable access and use**
- **contribute to sustainability by creating solutions that work for more people over time**
- **increase public trust in research and innovation by making it more transparent and inclusive**
- **support democratic accountability through participation and responsiveness**

In critical areas such as health, climate, mobility, and digitalisation, integrating gender and diversity dimensions supports innovation that is safer, more relevant, and more widely accepted. It helps build institutions that are not only more responsible, but also more resilient in the face of future challenges.

As societies grow more diverse and interconnected, Inclusive Gendered Innovation provides a clear path to doing research and innovation that truly serve the public interest.

A shared opportunity for better innovation

Across all parts of the research and innovation ecosystem, Inclusive Gendered Innovation offers more than a corrective to exclusion. It is a powerful enabler of **quality, relevance, and long-term value**. Whether improving product design, strengthening research impact, enhancing funding outcomes, or building public trust, IGI provides tools and strategies that

work in practice. Embracing these approaches is not just about doing what is right: **It is about creating innovation that truly performs in a changing world.**

Want to explore further?

Now that we introduced the core arguments for why **Inclusive Gendered Innovation** matters to researchers, companies, funders and society, you may want to dig deeper. The resources below offer real-world examples, research insights, and policy frameworks that inform this Support Package.

They draw on international expertise, EU-funded initiatives, and leading academic work and are grouped thematically for easy navigation.

Policy & Programme Design

- [Ljubljana Declaration on Gender Equality in Research and Innovation \(Council of the EU, 2021\)](#): The formal political commitment by EU Member States and associated countries to advance gender equality in research and innovation. Sets out six priority areas, including gender-equal career paths, Gender Equality Plans as instruments for institutional change, and inclusive governance of research systems. Forms the political basis for ERA Action 5 and the wider EU framework within which national RFO obligations sit.
- [GENDERACTIONplus \(2025\): Driving Forward Inclusive Gender Analysis in R&I Policies: Recommendations for Framework Programme 10. Position Paper No. 8: Outlines policy recommendations for embedding inclusive gender analysis in EU research funding, based on international expert consultations.](#)
- [ERA Policy Agenda 2022-2024: Overview of Actions \(European Commission, 2021\)](#): The EU strategic roadmap for the European Research Area, with Action 5 specifically dedicated to promoting gender equality and fostering inclusiveness. Defines the expected integration of gender dimensions across all research and innovation activities and sets the implementation framework for national RFOs. Directly relevant for RFOs seeking to align their policies and programmes with EU-level expectations and accountability mechanisms.
- [Canadian Institutes of Health Research \(2023\): A New Era of Sex and Gender Science: Impact Report 2015–2022: Reports progress on integrating sex and gender in Canadian health research through training, policy, and evaluation.](#)

Research Practices & Methodologies

- [Hunt, L. et al. \(2022\): A Framework for Sex, Gender, and Diversity Analysis in Research. *Science*, 377\(6614\), 1492–1495: Proposes a framework to help researchers include sex, gender, and diversity analysis in scientific research.](#)
- [Schiebinger, L. et al. \(Eds.\) \(2011–2024\): Gendered Innovations in Science, Health & Medicine, Engineering and Environment: Presents case studies showing how gender analysis enhances research excellence and innovation across disciplines.](#)

Conceptual & Theoretical Foundations

- [Hankivsky, O. \(2014\)](#): Intersectionality 101. Institute for Intersectionality Research and Policy, Simon Fraser University: *Introduces intersectionality as a lens for understanding overlapping social inequalities in policy and research.*
- [Eigenmann, L., et al. \(2024\)](#): Intersectional Transformation or ‘Gender Equality+’? Intersectionality in EU Research Policies. *European Journal of Politics and Gender: Analyses how intersectionality is addressed in EU research policy and where gaps remain.*
- [Johanson, E. \(2024\)](#): Sex and Gender Perspectives as Quality? On the Controversy About Gender and Science in Sweden. *NORA – Nordic Journal of Feminist and Gender Research: Explores debates in Sweden over whether gender perspectives in research threaten scientific autonomy.*

1.6 Navigating Challenges, Encouraging Change

Integrating gender and diversity into research and innovation content is not always straightforward. While the benefits are well established, many **researchers, evaluators, and funders encounter resistance** from individuals, institutions, or disciplinary norms.

This section addresses common concerns and offers constructive strategies for moving forward. Based on academic research and insights from the INSPIRE Community of Practice, the aim is to support change by building confidence, not pressure.

For additional guidance on managing resistance at the institutional or project level, see section 2.6.2. Researchers seeking to reflect critically on their own methods and assumptions will find specific strategies in section 2.6.3.

Common forms of resistance

Resistance can take many forms, often linked to uncertainty, lack of time, or fear of change. Examples include:

- **“This doesn’t apply to my field”**: Gender or inclusion may be seen as irrelevant, especially in STEM fields
- **Institutional hesitation**: Organisations may fear extra workload, lack expertise, or worry about political sensitivity
- **Concerns about quality**: Some assume inclusion will lower scientific standards
- **Fear of failure**: Practitioners may worry they do not have the right expertise or might get it wrong
- **Cultural discomfort**: In some settings, talking about gender remains sensitive or contested

Why resistance happens

Resistance is often not rooted in direct opposition, but in structural and cultural challenges:

- **Lack of clear guidance** or tools to act on inclusion
- **Absence of mandates or incentives** from funders and institutions
- **Power imbalances and masculine norms** in research cultures
- **Disciplinary traditions** that see inclusion as secondary or unrelated to excellence
- **Uncertainty about terminology or expectations**

How to respond constructively

Here are some ways to address resistance and support progress:

- **Link inclusion to excellence:** Show how gender and diversity analysis leads to better science. Argue that it improves relevance, reduces design flaws, and enhances impact. Frame inclusion is part of quality, not a challenge to it.
- **Use real-world examples:** Point to practical cases from this Support Package and EU projects such as Gendered Innovations, SUPERA or INSPIRE Case Studies. These help shift perceptions from theory to practice.
- **Shift the entry point:** Start with terms like user needs, human-centred or context-aware design, or stakeholder engagement. These often create less resistance and lead naturally to issues of gender and diversity
- **Start small:** Not every project can do everything. Small actions such as checking whether a method works for different users help build momentum.
- **Support learning and capacity building:** Provide training, peer exchange, and space to ask questions. Change is easier when people feel supported rather than judged.
- **Build internal networks:** Change often starts with a few motivated actors. Allies across departments, funding bodies, or research institutions can drive momentum and help shift organisational culture.
- **Supporting long-term change:** Inclusion takes time, but it also builds over time. Institutions that invest in IGIPs and capacity-building are better positioned to adapt to policy shifts, societal expectations, and research challenges.

As INSPIRE and other EU-funded projects show, **resistance is not a stopping point**. It is a starting point for building stronger, more inclusive systems with practical tools, peer learning, and institutional support, research teams can amplify good practices and shift norms. Throughout the Support Package you will find actionable advice that is target to overcoming resistances throughout every part of the research and innovation and funding cycle.

Want to explore further?

Now that we've outlined the main challenges and strategies for integrating Inclusive Gendered Innovation into research and innovation, you may want to dig deeper.

The resources below offer conceptual frameworks, policy guidance, and empirical studies grouped by theme to help you explore the aspects most relevant to your work:

Enabling Change through Policy and Programme Design

- [Dvořáčková, J.](#) (2025). Addressing resistances to policies promoting sex/gender analysis in research and innovation content (GENDERACTIONplus Position Paper No. 14, forthcoming). *Provides a typology of resistances and targeted strategies for research funders to overcome pushback against the integration of sex/gender analysis in funding calls and evaluations.*
- [Karaulova, M., Bühler, S., Reidl, S., Wienand, C., Araki, M., Schiffbänker, H., Anders, G., Beranek, S., Greithanner, J., Holzinger, F., & Walker, D.](#) (2025). D3.10 Report on an inclusive innovation system for the private sector: business enterprise perspective. Zenodo. <https://doi.org/10.5281/zenodo.17294338>
- [Schiffbänker, H., Reidl, S., Beranek, S., Holzinger, F., Wienand, C., Bühler, S., Walker, D., Anders, G., Araki, M., & Greithanner, J.](#) (2025). D3.10 Report on an inclusive innovation system for the private sector: research funder perspective. Zenodo. <https://doi.org/10.5281/zenodo.17294454>
- European Institute for Gender Equality (EIGE). (n.d.). *Institutional transformation – Dealing with resistance. Outlines key forms of resistance and strategies for addressing them within the broader framework of institutional transformation and gender mainstreaming.*
- Ginès i Fabrellas, A., & Avogaro, M. (2021). *Engaging stakeholders and tackling resistances to mainstream gender equality in AHMSSBL research institutions* (Toolkit, WP8.4, Version 1.0). EQUAL4EUROPE Consortium.
- Sağlam, G., Tan, M. G., Çağlayan, H., Almgren, N., Salminen - Karlsson, M., Baisner, L., Myers, E. S., Jørgensen, G. T., Aye, M., Bausch, S., O'Connor, P., O'Hagan, C., Richardson, I., Conci, M., Apostolov, G., & Topuzova, I. (2016). Handbook on resistance to gender equality in academia (Expert Report No. FESTA-2016-010). FESTA Project. <http://www.resge.eu/>. *Provides conceptual and empirical insights into how resistance manifests in academic institutions and suggests approaches to counter it through cultural and structural change.*
- Ferguson, L., & Mergaert, L. (2021). Resistances to structural change in gender equality in higher education. SUPERA project, Yellow Window. *Synthesises experiences from Horizon 2020 structural change projects, identifying common resistance patterns and offering practical tools to support implementation.*

Improving Research through Inclusive Methods

- Hunt, L., Nielsen, M. W., & Schiebinger, L. (2022). A framework for sex, gender, and diversity analysis in research. *Science*, 377(6614), 1492–1495. *Proposes a framework for integrating sex, gender, and diversity analysis into research funding policy and practice, based on a global review of agency approaches.*
- Schiebinger, L., & Hunt, L. (2021). Integrating sex, gender and intersectional analysis

into research: Lessons from international practice. Stanford University & CIHR. *Draws on international examples to demonstrate how intersectional analysis can improve research quality and impact across disciplines.*

- Nielsen, M. W., Alegria, S., Börjeson, L., Etzkowitz, H., Falk-Krzesinski, H. J., Joshi, A., ... & Schiebinger, L. (2017). Gender diversity leads to better science. *Proceedings of the National Academy of Sciences*, 114(8), 1740–1742. *Presents empirical evidence showing that greater gender diversity in research teams leads to higher quality and more innovative scientific outcomes.*
- Powell, S., Ah-King, M., & Hussénus, A. (2017). “Are we to become a gender university?”: Facets of resistance to a gender equality project. *Gender, Work & Organization*, 24(1), 56–70. *Analyses internal resistance within universities to a gender equality initiative, highlighting emotional, symbolic, and discursive dimensions of pushback.*

2. For Research and Innovation Funding Organisations (RFOs): How to design, implement and embed Inclusive Gendered Innovation Policies

This chapter aims to support **Research and Innovation Funding Organisations** in embedding **Inclusive Gendered Innovation (IGI)** into their everyday work. It is intended for **programme managers, evaluators, policy officers**, and others involved in funding or reviewing research and innovation projects.

Funding organisations approach IGI from different positions. **In some organisations, integrating gender and diversity is already a mandatory requirement across all calls.** In others, it is being introduced through dedicated programmes or pilot initiatives. **This chapter is designed to be useful regardless of where your organisation stands** - whether you are reinforcing existing requirements, expanding their scope, or taking the first steps towards systematic implementation.

What you find here is based on **real-world experience**. It draws on case studies from the **INSPIRE project**, including:

- [Vinnova](#) (Reidl et al., 2025)
- [FFG](#) (Schiffbänker and Walker, 2025)
- [The European Commission](#) (Holzinger et al., 2025)
- [FONRID](#) (Wienand et al., 2025)

It also builds on a [comparative report on RFOs](#) and extensive input from the **INSPIRE Community of Practice (CoP)** made up of representatives of RFOs across the globe. We thank our CoP members for helping shape this chapter into a tool that reflects **real needs and tested solutions**.

For those who prefer a guided learning format, the INSPIRE e-learning platform also offers **OTU7: Inclusive Gendered Innovation Policy Toolkit** ([available here](#)), an interactive online training unit that covers the same funding-cycle topics addressed in this chapter. OTU7 and SPK5 are designed to be used together: OTU7 as an accessible entry point, SPK5 as the detailed reference guide.

How to use this Chapter

To fit different starting points and needs, this chapter is structured as a **modular guide**. It includes **10 steps (Steps 0–9)** that follow the main stages of the **research and innovation funding cycle**. You can go through the steps in sequence or pick the ones most relevant to your current work. Each step provides practical entry points to strengthen inclusion across your organisation.

The steps are:

- **Step 0:** Getting Started – Creating the Foundation for Inclusive Gendered Innovation Policies within RFOs
- **Step 1:** Programming and Budget Allocation
- **Step 2:** Designing Inclusive Calls
- **Step 3:** Applicant Guidance and Support
- **Step 4:** Reviewer Selection and Panel Composition
- **Step 5:** Reviewer Briefing and Evaluation Criteria
- **Step 6:** Assessment Process and Decision-Making
- **Step 7:** Funding Decisions and Feedback
- **Step 8:** Monitoring and Reporting
- **Step 9:** Learning and Continuous Improvement

What You'll find in each Step

Each step follows the following structure:

- A short **introduction** explains where the step fits into the funding cycle and how it contributes to more inclusive gendered innovation.
- **Learning goals** show what your team can reflect on, decide, or put in place by the end of the step.
- Common **challenges**, based on insights from other funding organisations, help you anticipate typical barriers and think through possible responses.
- **Practice-based action points, examples, and tools** support you in applying what you've learned in your own context.

The steps move from early groundwork to long-term improvement. You can follow them in order or focus on the ones that best fit your current priorities.

Complementary e-learning resource: INSPIRE OTU7

This Support Package is accompanied by an interactive online training unit developed within the INSPIRE project. **OTU7: Inclusive Gendered Innovation Policy Toolkit** is available free of charge on the INSPIRE e-learning platform and is designed specifically for staff in research funding organisations.

While SPK5 provides comprehensive written guidance, **OTU7 offers a structured e-learning pathway** through the same topics, including policy design, call development, evaluation criteria, and monitoring. The two resources are complementary: you can work through OTU7 as a guided introduction and return to the relevant steps in this document for in-depth support.

Access OTU7 here: [OTU7: Inclusive Gendered Innovation Policy Toolkit](#)

2.1 Step 0: Getting Started - Creating the Foundation for Inclusive Gendered Innovation Policies within RFOs

Getting started with inclusive gendered innovation may feel complex—but it **begins with small, strategic steps inside your organisation**. This step supports research and innovation funders in creating the internal conditions needed to design and implement effective policies that enable applicants to integrate gender and diversity dimensions into the content of research.

You might be asking yourself:

- Where do we even begin?
- Who needs to be involved?
- How can we make sure this becomes part of how we work, not just a temporary project?

You don't have to be an expert to start. Step 0 is here to support you in taking those first steps. This step is all about what needs to happen inside your organisation before inclusive policies can be reflected in funding calls, programmes, or reviews. It supports funding organisations in aligning internally, sparking conversation, building a shared understanding, and preparing for long-term change.

You'll explore how inclusion connects to your mission, how to involve others across teams, and how to create safe, supportive spaces to learn and grow together. You don't need a perfect plan to get started - just the willingness to take small, intentional steps.

From our work in **INSPIRE's Community of Practice** and our research across different countries and funding organisations, we know that **every organisation has a different starting point**. Some already have gender equality measures in place or even funding programmes focussing on gender and intersectionality in research content. Others are just beginning to explore what inclusion could look like in their programmes. Moreover, some already benefit from strong leadership support, while others rely on small teams or individuals

who keep the conversation going. **This step aims to help across these different realities.**

You can start with what is already there: a conversation, a review of existing templates or an opportunity to bring others into the discussion. You might begin by identifying relevant structures and processes, exploring ways to involve external expertise, or aligning existing documents with your goals.

This step offers some **practical entry points**. For instance, support for building a shared understanding, creating internal visibility, and connecting your actions to your organisation's mission and values. It gives you the space to ask questions, test ideas, and strengthen your foundation - so that inclusive approaches become a visible and sustainable part of your work.

It is crucial to keep in mind that you **do not have to reinvent the wheel**. Therefore, as in all other steps, we included a carefully curated resource section for you providing guidelines and best practices.

After working through this step, you:

- have begun to explore how gender and inclusion could connect to your strategic goals or values
- are better able to identify areas where internal understanding may differ or is unclear
- have considered how inclusion and gender can become more tangible and relevant within your team's context
- are in a position to initiate further internal discussions and gather perspectives

When organisations begin working with inclusive gendered innovation, it is common to face uncertainty or hesitation. This is often the moment when questions arise as routines are challenged, and internal dynamics become visible. Many of the funders in the INSPIRE Community of Practice shared their experiences and found that these **challenges are not a sign of failure, but a natural part of starting something new**. You might recognise some of the following **challenges**:

Challenges:

- **The topic may feel abstract or unfamiliar.** It is not always clear how inclusion and gender relate to research funding and content.
- **Different teams may have different understandings.** Not everyone starts from the same level of awareness.
- **Responsibility is often unclear.** Inclusion is sometimes seen as the job of a specific team, such as HR or legal, rather than something connected to funding specific practices and content. Awareness is required at all levels for IGI policies to be truly effective.
- **Internal experience may be limited.** Without prior work in this area, it can be hard to know what is possible or where to begin.
- **Existing documents or processes may not offer an entry point.** Funding templates, strategy papers or decision-making routines might not yet reflect inclusive aims and need adaptation.
- **Leadership support may not be visible.** If gender and diversity dimensions in research content are not mentioned or endorsed at the leadership level, staff may hesitate to act on their own. Securing leadership support is key.
- **There may be concerns about added workload.** Some colleagues may see this as extra work as they do not see the added value in the beginning.
- **There is often little space for reflection or exchange.** Without informal learning spaces, staff may not feel comfortable asking questions or sharing ideas about how to best integrate gender and diversity dimensions in funding calls and procedures
- **Efforts may depend on individual commitment.** Without structures or shared ownership, early steps can rely too much on personal motivation. In our research we encountered very dedicated individuals on the brink of burnout, because they could not share the workload with others.

These challenges are common, and you do not need to solve them all at once. The first step is to **understand where your organisation is starting from and to begin building from there**. Taking action does not require a formal strategy or complete plan. Often, small and intentional steps are enough to open up conversations, raise awareness, and prepare the ground for future work.

The following suggestions are based on experiences shared by funders in the INSPIRE Community of Practice. They reflect what has worked in different organisational contexts and can be adapted to yours:

Actions:

- **Build on what already exists.** Look at your organisation's strategies, values, or equality goals. Inclusive approaches often fit well with quality, excellence, and relevance. Use these links to connect your work to ongoing priorities.
- **Use existing examples.** You do not need to create everything from scratch. Other funding organisations have already developed tools, templates, and entry points. Use what makes sense for your context and adapt it to your needs. You can find many examples in the resource section after each step.
- **Create space for internal conversation.** Invite colleagues to explore the topic together. A short meeting, an informal exchange, or a reflective session can open the door to a shared understanding.
- **Engage others early.** Reach out to people in different teams or roles. Shared responsibility helps create stronger support and avoids the perception that this work belongs only to one unit.
- If possible, try to **find allies** (even just one) **among senior decision-makers** or influential staff members within the organisation. Their support can be critical when it comes to legitimising the importance of inclusive gendered innovations and gaining broader institutional buy-in.
- **Make your efforts visible.** Even small actions can signal that this topic matters. For example, include inclusive language in documents, raise questions related to equality and inclusion in meetings, or highlight the topic in internal updates.
- **Allow yourself to start small.** It is fine to begin with uncertainty. You can learn from early steps, reflect as you go, and make adjustments along the way. The important thing is to begin.

Define Policy Purpose and Create a Shared Understanding

To clarify *why* your organisation is working with inclusive gendered innovation and *what* this means in your context can make all the difference. Without a **shared understanding** efforts could stay fragmented, feel like a box-ticking exercise or loose connection to your actual goals and values.

For many teams, integrating gender and diversity dimensions in funding procedures is still a new topic. In our case studies from [Vinnova](#), [FFG](#), [EC](#), [FONRID](#), we observed that Inclusive Gendered Innovation is often linked mainly to gender balance, but Inclusive gendered Innovation goes deeper. It's about *who defines research problems, whose needs are considered*, and *who benefits from the knowledge and solutions that are funded*.

To avoid confusion, it is important to be clear about what this work involves—and what it

doesn't. Inclusion in the context of Inclusive Gendered Innovation is not **primarily about team composition**. It is fundamentally about **how research and innovation are framed, designed, and implemented**. This includes the formulation of research questions, methods of data collection, the identification of target groups, and the assessment of impact. The INSPIRE case studies showed that this distinction often needs to be made explicit to staff, applicants, and reviewers alike.

Taking time to reflect on how this connects to your organisation's mission, values, and funding priorities and procedures can help make the topic more concrete. It also opens up **space for dialogue**. Teams may hold different assumptions or expectations, and surfacing those early can strengthen how you work together.

A shared framing also brings **clarity** and **helps to align future steps**. It helps different parts of the organisation pull in the same direction - whether designing programmes, writing call texts, or communicating with applicants and reviewers. It supports coherence in programme design, team responsibilities, and communication with applicants and stakeholders.

Still, developing a shared purpose and language across teams can be difficult in practice, especially when the topic is new or if there are different understandings across the organisation. In the following box, we outlined common challenges we derived from our research:

Challenges:

- **Inclusion is understood differently across the organisation.** Without shared language or reflection, teams may work with very different assumptions or expectations.
- **The focus often remains on representation.** Many staff associate inclusion with team composition, not with research questions, methods, or knowledge outcomes.
- **It can be hard to describe why this work matters.** Without a clear internal framing, the relevance for research quality or innovation goals may remain vague.
- **There may be hesitation to open the discussion.** Staff can feel unsure how to talk about these topics or worry they lack background knowledge
- **Strategic goals and inclusion efforts are not always connected.** If inclusion is not linked to core values or programme logic, it risks feeling optional or isolated.
- **Language can be a barrier.** Terms like "intersectionality" or "inclusive innovation" may feel unfamiliar or too abstract, limiting engagement.

Addressing these challenges starts with creating space for reflection and making the topic more concrete. The following suggestions offer practical ways to build shared understanding and internal clarity:

Actions:

- **Start with a shared conversation.** Organise a short internal session where colleagues reflect on what gender and inclusion means in their area of work. Even an hour of informal exchange can surface different assumptions and enable to find a common language and possible entry points
- **Create space for learning.** Encourage staff to ask questions, share doubts, and reflect together. Peer exchange, storytelling, or reviewing good practice examples can help make the topic feel more approachable and less abstract.
- **Involve different parts of the organisation early on.** Strategic framing should not be left to one person or unit. Programme teams, leadership, and communications staff all bring useful perspectives - and all shape how the message is carried forward.
- **Involve Experts at Early Stages:** Members of our Community of Practice found it useful to also bring in expert advice on this and to engage with other more experienced funders at early stages. It is key to involve internal staff that is more familiar with gender equality principles (e.g. gender equality officer) and if needed close knowledge gap with external expert support.
- **Use real-world examples to make it concrete.** Illustrate how gender and diversity affect research outcomes. For instance, biased data in AI, medical devices that fail to account for sex-based differences, or transport systems that overlook safety concerns across genders. These examples can help clarify what this work is really about. You can find more examples in the provided documents in the resource section.
- **Be clear about what this work involves and what it doesn't.** Clarify that inclusion is not just about representation in teams. It also relates to research questions, data collection, target groups, and impact.
- **Link the topic to existing goals.** Show how inclusive approaches align with existing organisational aims - such as supporting high-quality research, maximising impact, or ensuring relevance. Framing inclusion as a contribution to excellence can shift internal attitudes from obligation to opportunity.
- **Develop a simple framing paper or talking points.** A short document that links inclusive innovation to your organisation's gender equality strategy and funding goals, values, or definition of excellence gives staff something to build on. This helps ensure that teams speak about the topic consistently and with confidence.

Align with your Organisational Strategy

Inclusive gendered innovation is more likely to gain traction when it **connects to your organisation's existing strategies and goals**. When inclusion is framed as part of what already matters - such as excellence, relevance, fairness, or societal impact - it becomes easier to integrate into decisions, documents, and routines.

In many funding organisations, the foundations are already there: mission statements, funding principles, evaluation criteria, or commitments to responsible research can serve as entry points. Strengthening these links helps shift inclusion from an external demand to an internal priority.

Clear alignment supports consistency across e.g. calls, communication, and review processes. It also makes expectations more credible, both for internal teams and for applicants. This can help create shared direction and reinforce inclusion as part of funding quality and responsibility.

Even when organisations value inclusion, it's not always clear how to connect it to their strategic goals or embed it into existing structures. Many funding organisations find themselves navigating unclear mandates, fragmented responsibilities, or shifting priorities. Common challenges include:

Challenges:

- **Strategic goals remain broad or abstract.** Terms like excellence or impact are often not defined in ways that clearly include gender or diversity, making it harder to position IGI as part of these priorities.
- **Inclusion is seen as a standalone issue.** Without strategic framing, IGI can feel disconnected from the core business of funding and may be sidelined as a separate equality measure.
- **Existing policies and documents don't mention inclusion.** Many organisations lack clear references to IGI in their strategies, call templates, or internal guidelines - leaving staff unsure how to justify or prioritise related work.
- **Responsibilities are fragmented.** Strategic alignment may depend on individual champions, with no formal structure or shared ownership across units. From our research we know that at times individuals have extensive knowledge, which is lost in case of transfers
- **Changes in leadership or funding focus create uncertainty.** When organisational priorities shift, gender and inclusion work can lose momentum if it is not visibly anchored in core strategies.

Tackling these challenges starts with identifying existing entry points and building on what is already there. The following actions can help make inclusion part of your organisation's strategic language, routines, and decision-making.

Actions:

- **Look at where inclusion already fits.** Review your organisation's mission, funding goals or quality criteria. Inclusion often connects naturally to ideas like excellence, impact or relevance.
- **Show how this supports your goals.** Prepare a short note or slide that links inclusive gendered innovation to what your organisation already values. This could include responsible research or innovation that benefits society.
- **Use real examples.** Point to a recent call or funded project that already reflects inclusive aims. Showing how this works in practice helps make the case more concrete.
- **Start a conversation with strategy or leadership teams.** A short meeting or informal discussion can help explore where IGI fits into planning and how it connects to current priorities.
- **Connect to related strategies.** Check your organisation's goals on equality, sustainability or societal benefit. These can offer strong starting points for making inclusion part of the bigger picture.
- **Build on what exists.** Instead of writing new policies, adapt current documents such as strategy texts, call templates or internal guidelines. Even small changes can make a difference.
- **Use familiar language.** Talk about inclusion in ways that reflect how your organisation already speaks. Terms like fairness, relevance or quality can help make the message stick. From our experience in the Community of Practice, terms like "intersectionality" are less likely to be taken over as they have not been previously established
- **Work across teams.** Bring together programme staff, strategy units and communications colleagues to align efforts. This helps make inclusion part of shared planning, not just one team's task.
- **Make leadership support visible.** A short quote, internal message or mention in a meeting can send a strong signal that inclusion matters and should be taken seriously.

Develop Internal Capacities

Strengthening internal capacity is essential for turning inclusive gendered innovation into consistent practice. This means ensuring that colleagues across different teams understand not only *why inclusion matters*, but also *how to support it* in their daily work.

This involves **different kinds of expertise depending on the role**. Our research revealed that Programme managers are core actors who need to know how to design calls that encourage applicants to address gender and diversity dimensions in research content. Staff who support applicants need to be able to explain expectations clearly and guide researchers toward useful resources. Those involved in the assessment process need to communicate IGI goals to reviewers and help ensure that proposals are evaluated fairly and consistently, also being able to overcome resistances from reviewers.

Rather than relying on generic training, capacity-building should speak to these specific responsibilities. **It works best when it connects directly to the tasks** - such as writing a call text, drafting a guide for applicants, or planning reviewer briefings. Internal learning formats that focus on examples, peer exchange, and challenges can help teams feel more confident and prepared.

Over time, this kind of learning helps create shared routines and language. It ensures that inclusion becomes part of how your organisation designs programmes, supports applicants, and defines research quality.

Developing internal capacities sounds straightforward but in practice, many funding organisations face recurring hurdles. These often have less to do with motivation, and more with gaps in structures and guidance:

Challenges:

- ❑ **Confidence and experience vary.** Some staff already work comfortably with gender and inclusion, while others hesitate. For example, a programme officer may support the idea in principle but feels unsure how to judge relevance in a proposal or explain expectations to applicants.
- ❑ **Learning formats don't always fit.** Many organisations rely on general equality training or one-off workshops. But these often don't connect to real tasks e.g. writing call texts, briefing reviewers, or handling applicant questions.
- ❑ **Opportunities for exchange are limited.** Staff rarely have the chance to reflect on their own practice, ask questions informally, or learn from peers in other teams. Without this space, knowledge stays fragmented.
- ❑ **Practical guidance is missing.** Teams often lack concrete tools to support their work. For example, staff working with reviewers may not know how to explain what to look for in terms of gender relevance. Applicant support teams may feel unsure what kind of examples or resources to share.
- ❑ **Internal knowledge stays siloed.** When someone figures out how to integrate inclusion into their work, that learning is often not shared across units. Good practices may stay local instead of shaping broader routines.

Addressing these challenges starts with making learning more accessible, relevant, and grounded in everyday work. The following suggestions offer practical entry points that can help build confidence and support across teams:

Actions:

- **Offer low-threshold learning formats.** Try informal talks, peer exchanges, or short Q&A sessions where staff can ask questions and share experiences without pressure.
- **Use examples from actual programmes.** Show how gender and diversity have been addressed in calls or proposals of more experienced RFOs. Concrete cases make it easier to recognise relevance and apply insights (see resource section)
- **Tailor learning to different roles.** Programme officers, applicant support staff, and reviewers all have different needs. Avoid one-size-fits-all approaches and focus on what helps in specific functions. There is also a variety of tools (webinars, guidelines, check list) you can employ. You can choose what works best for your team.
- **Map support needs across teams.** Ask where colleagues feel unsure - whether it's drafting guidance, reviewing proposals, or explaining expectations.
- **Recognise internal knowledge.** Identify colleagues who already work with gender or inclusion and involve them at early stages. Visible peer expertise builds confidence across teams.
- **Collect and work with real questions.** Ask staff what they're struggling with or curious about. Use this input to design tools, guidance, or discussion topics.
- **Pilot a focused session.** Start small - for example, a 45-minute discussion on how to address IGI in a particular call.
- **Reach out to other funders.** Connect with organisations that have already started working on IGI. Ask what helped them, what they wish they'd done earlier, and what formats worked best.
- **Emphasise learning over perfection.** Make clear that this is not about being an expert. It's about building shared capacity over time. Framing it as a learning process helps reduce hesitation and increase ownership.

Create a Safe Space for Mutual Learning

This step focuses on building an institutional culture where staff can engage with gender and diversity in research content and funding procedures openly and without fear of making mistakes. When the integration of gender and diversity is only framed as a policy obligation or technical standard, it can discourage honest questions and experimentation. Creating a safe

learning environment supports long-term change by encouraging reflection, dialogue and incremental improvement.

Mutual learning does not require formal training programmes. It can happen in regular team exchanges, informal check-ins or through shared reflection on pilot activities. The goal is to normalise learning around inclusion topics and make it easier for staff to participate without pressure. In some more traditional or hierarchical organisations, participatory approaches may feel unfamiliar or less legitimate compared to expert-led formats. In such cases, it helps to explain the purpose of mutual learning and why shared reflection is essential to enabling inclusive gendered innovation.

It is also important to support knowledge sharing across roles and departments. This helps prevent siloed expertise and reinforces the idea that Inclusive Gendered Innovation is a shared responsibility—not the task of one person or team.

Challenges:

- Staff worry about saying the wrong thing or not being informed enough to participate
- Inclusion is framed as a technical issue rather than as an area for collective learning
- There are few opportunities to share experiences or learn from what worked or did not
- Mistakes or uncertainties are not openly discussed, which limits growth and learning
- Participatory learning formats may be met with skepticism in more traditional settings

Members of our Community of Practice found the following actions helpful:

Actions:

- **Framing it right:** Talk about inclusion in research content as something teams can learn and explore together, not just something they have to get right
- **Create moments for team reflection:** This can happen after a funding call or a pilot, where you discuss what worked and what could be improved
- Encourage colleagues from different teams to share experiences
- Write down lessons learned in a shared place so others can build on them
- Explain the value of learning together, especially in workplaces where people are more used to formal training sessions

Build institutional Support Structures

Creating institutional support structures helps to make sure that IGI does not depend on individual effort. Once your organisation has clarified its purpose, aligned the topic with strategic goals and started building staff capacity, the next step is to **put systems in place that support coordination, continuity and shared responsibility**.

This can include assigning internal contact points, setting up cross-team working groups, or creating spaces where programme staff, leadership, and support functions regularly exchange. It might also mean building feedback loops between those who write calls, support applicants and work with reviewers, so that learning can be shared and improvements made over time.

Formalising roles, routines and responsibilities helps turn scattered efforts into shared practice. It also provides stability when staff or leadership change and helps others in the organisation see that inclusion is part of how the institution works - not just a temporary or isolated activity.

Even when there is motivation to act, building long-term support structures can be difficult. Many organisations struggle to move from informal efforts to more stable, coordinated approaches. Common challenges include:

Challenges:

- **Efforts rely on individual commitment.** When one person or team drives inclusion work without broader structures in place, progress is fragile and often unsustainable.
- **No clear coordination mechanism exists.** Teams may work on IGI in isolation, without spaces for regular exchange or shared planning across units.
- **Responsibilities are not formalised.** Inclusion-related tasks may be taken on informally, which makes it harder to scale or ensure continuity when staff change.
- **Feedback loops are missing.** Lessons from one programme or team may not reach others, and useful knowledge can stay local or get lost.
- **Resources are not allocated.** Without time, staff capacity, or budget for coordination, even motivated teams struggle to maintain momentum.
- **Structures are vulnerable to leadership change.** Without formal anchoring, inclusion work can lose visibility or priority when leadership priorities shift.

Building institutional support is not about setting up something large or complex right away. Often, small steps toward coordination and shared responsibility can make a lasting difference:

Actions:

- **Create a simple coordination structure.** Set up a small working group or internal task team that brings together staff from different units involved in programme design, applicant support, or evaluation.
- **Assign clear contact points.** Make it easy for teams to know who to talk to about IGI. A named person or small team can support consistency and act as a connector across units.
- **Make roles and responsibilities visible.** Write down who does what in IGI-related work - whether for writing calls, developing guidance, or organising internal sessions. This helps others get involved and supports continuity.
- **Build in regular exchange.** Create time for teams to share updates, ask questions, or discuss new ideas. Even a short quarterly check-in can help coordinate efforts and build shared practice.
- **Link programme work with learning.** Use feedback from applicants, reviewers, or internal sessions to improve tools, guidance, or future calls. Closing these loops makes support structures more useful over time.
- **Connect IGI to existing structures.** See where inclusion work can build on structures that already exist - for example, quality management, evaluation planning, or thematic working groups.
- **Secure basic resources.** Make sure time, staff support, or a small coordination budget is available. Even modest resources signal that this work matters and deserves space.
- **Document and share progress.** Keep a simple record of what you're learning and developing. This supports institutional memory and helps others build on what's already there.

Involve Experts and Advisory Structures

Working with inclusive gendered innovation often means navigating new questions and unfamiliar territory. **External experts and advisory structures can provide valuable support** by offering knowledge, perspective, and feedback that help your organisation grow more confident and consistent in this work.

Expert input can be especially helpful when shaping calls, writing guidance, or reviewing internal processes. It can also offer space to reflect on blind spots and raise questions that might otherwise be missed. Advisory structures whether formal or informal can create continuity, support learning over time, and connect internal efforts with broader expertise.

This kind of support does not have to be formal or expensive. Many funding organisations start small by inviting feedback on a document, organising a peer exchange, or consulting experienced colleagues from other funding bodies. **What matters is building a space for dialogue and making use of the knowledge that already exists within and beyond your organisation.**

Involving external expertise can be very helpful, but many organisations are unsure where to start or how to make it work within their structures. Common challenges include:

Challenges:

- **Uncertainty about where to find relevant experts.** Staff may not know who to approach or worry that outside expertise will not match their funding context.
- **Expert advice feels disconnected from daily work.** External input can remain abstract or too academic if it is not linked to concrete tasks like call design or proposal assessment.
- **Involvement happens too late.** Experts are sometimes brought in only after key decisions are made, limiting their ability to shape meaningful change.
- **No structure for ongoing exchange.** Without a clear format or point of contact, expert engagement tends to be occasional and hard to sustain.
- **Internal teams feel unsure about how to work with experts.** There may be concerns about roles, expectations, or how to translate advice into practice.
- **Support structures lack visibility or legitimacy.** If advisory input is not clearly positioned, it may be overlooked or not taken seriously by other teams.

Involving external input works best when it is planned with clear roles, linked to real **decisions, and shaped around your organisation's needs.**

The suggestions below offer ways to get started and build lasting support.

Actions:

- **Start with a focused question or task.** For example, ask for expert feedback on a draft call text, internal tool, or reviewer guidance. This makes input easier to act on and keeps the process manageable.
- **Bring experts in early enough to influence decisions.** Involve them during planning stages, not just at the end. For instance, consult during call design, not just at review stage.
- **Use existing networks to identify useful expertise.** Peer funders, researchers, or practitioners can often recommend experts with both content knowledge and policy experience.
- **Join networks that focus on inclusion in research and innovation.** These can provide ready-made opportunities for advice, learning, and collaboration.
- **Keep structures for exchange simple and lightweight.** This could be an informal advisory group, a guest speaker in a team meeting, or a short learning session.
- **Clarify expectations when engaging external experts.** Explain what kind of input you need and how it will be used. This helps both sides prepare and engage meaningfully.
- **Involve internal teams directly in conversations with experts.** Joint exchanges between programme staff, leadership, and advisors help connect insights to your actual processes.
- **Build relationships over time.** Ongoing collaboration—even if occasional—helps build trust and a shared language.
- **Make contributions visible.** Mention expert input in internal updates or public communications. This shows its value and supports broader acceptance.

Adapt Internal Policy and Prepare Tools

This step is about reviewing and adjusting internal documents, templates and guidance materials so they support your organisation's Inclusive Gendered Innovation Policies. Many funding processes rely on standardised forms, workflows and checklists. If these do not include space for inclusion-related considerations, the policies can be difficult to apply in practice.

Preparing tools is not about creating everything from scratch. Often, small changes to existing templates or language can make a meaningful difference. The aim is to make the policies visible and actionable across the funding cycle by ensuring it is embedded in your organisation's operational routines.

Clear and supportive tools also help programme staff, applicants and reviewers feel more confident in addressing IGIP. They provide orientation, reduce uncertainty and promote more consistent implementation. From our research and experience, we found that the following challenges come up frequently:

Challenges:

- Templates and forms do not reflect IGIP goals, so inclusion is overlooked in practice
- Staff and applicants are unsure where or how to address IGIP in their submissions
- There are no internal examples or guidance materials to support implementation
- Revising documents seems time consuming or complicated without clear starting points

Here are some actions the members of our Community of Practice found useful:

Actions:

- **Review existing templates and documents.** Look at call planning tools, application forms, and programme guides to see where inclusion in research content could be made clearer or stronger.
- **Add prompts and examples to support implementation.** Include short guiding texts, checklists, or sample questions in templates to help teams and applicants understand what's expected.
- **Use pilot calls or selected programmes to test new formats.** Start small with revised language, tools, or workflows and build from there.
- **Adapt existing tools from peer organisations.** Use what others have shared and tailor it to your own context, saving time and building on tested ideas.
- **Develop short, user-friendly resources.** A quick guide, FAQ, or checklist can help programme staff and reviewers address gender and inclusion more confidently.
- **Consult with internal users during development.** Ask programme teams and reviewers to test and give feedback on new tools so they're clear, relevant, and easy to apply.
- **Learn from past feedback.** Review comments from previous calls to identify where applicants or reviewers struggled with gender and inclusion requirements.

Secure Leadership Commitment and Visibility

For inclusive gendered innovation to take root across your organisation, it needs both **clear leadership support and visible communication**. When senior management actively endorse this work and messages are consistent across teams and audiences, it becomes easier for staff and stakeholders to understand its relevance and engage with confidence.

Support doesn't need to begin with a formal policy. Small, visible actions such as referencing inclusion efforts in staff meetings, endorsing internal learning activities, or encouraging the development of guidance materials can send a strong signal. These actions show that working with gender and diversity in research content is part of what your organisation values in quality and impact.

Clear communication is just as important as leadership endorsement. When inclusion is mentioned in planning documents, team briefings, and funding materials, it becomes a natural part of how your organisation works and not an isolated task for a single team. This helps staff see the connection to their own roles and encourages shared ownership across departments.

Communication doesn't have to mean a campaign. Often, it's about using the right language in the right moments—whether through an internal update, a message in a newsletter, or a short explainer shared with applicants. Consistency across formats builds trust and reduces confusion about what's expected.

To support this, it helps to **coordinate with communications teams and tailor language for different audiences**. Referring to inclusion goals in strategic plans, annual reports, or board discussions reinforces their importance. Public materials (e.g. call texts, applicant guidance, or web content) should also reflect these priorities, so external partners understand that inclusion is part of the organisation's identity.

Challenges:

- Inclusion is seen as a side topic rather than a strategic priority
- Leadership is unsure how to engage without deep knowledge
- Internal and external messaging is inconsistent or unclear
- Staff, applicants, or reviewers are unsure what's expected in practice
- Communication capacity for equality and inclusion topics may be limited

Here you can find some actions suggested by our Community of Practice and informed by our research:

Actions:

- **Encourage leadership to speak about gender and inclusion in meetings and strategy discussions.** Even brief references can show that it matters.
- **Invite leaders to take part in relevant events.** Having them open learning sessions, support pilots, or endorse new tools increases visibility.
- **Mention gender and inclusion in strategic documents, board updates, and internal reports.** This shows it's part of broader organisational goals.
- **Review communication materials for alignment.** Check whether call texts, guidance, and onboarding content send consistent messages.
- **Create simple, accessible tools like FAQs or one-pagers.** These help explain what's expected in a clear and inviting way.
- **Use examples and stories to make inclusion concrete.** Case studies or outcomes from pilot projects help others see what success looks like.
- **Adjust messages for different audiences.** Speak differently to leadership, programme staff, and external applicants to ensure relevance.
- **Coordinate with communications staff.** Work together to plan how inclusion can be reflected in ongoing communication efforts.
- **Make support visible.** Highlight leadership involvement in reports, emails, or internal briefings to keep momentum strong.

Here you find more support

Our Research:

- Schiffbänker, H., Reidl, S., Beranek, S., Holzinger, F., Wienand, C., Bühler, S., Walker, D., Anders, G., Araki, M., & Greithanner, J. (2025). D3.10 Report on an inclusive innovation system for the private sector: research funder perspective. Zenodo.
- Karaulova, M., Bühler, S., Reidl, S., Wienand, C., Araki, M., Schiffbänker, H., Anders, G., Beranek, S., Greithanner, J., Holzinger, F., & Walker, D. (2025). D3.10 Report on an inclusive innovation system for the private sector: business enterprise perspective. Zenodo.
- **INSPIRE Case Study – Vinnova (Sweden):** Demonstrates how norm-critical innovation can challenge dominant paradigms and promote cultural change. Useful for understanding learning environments and internal engagement. *Relevant for shared understanding, organisational learning, and internal culture*

- [INSPIRE Case Study – FFG/FEMtech \(Austria\)](#): Shows how gender relevance can be embedded in programme logic and assessment. Also illustrates the importance of internal structures and leadership support. *Relevant for programme design, internal coordination, and leadership visibility*
- [INSPIRE Case Study – Horizon 2020 \(European Commission\)](#): Demonstrates how gender dimensions were embedded in large-scale funding frameworks. Shows how advisory input shaped guidance, and how communication clarified differences between representation and research content. *Relevant for strategy alignment, expert involvement, structural support, and communication*
- [INSPIRE Case Study – FONRID \(Burkina Faso\)](#): Illustrates how IGIP can be applied in contexts with limited formal structures. Shows the role of local expertise, tailored applicant communication, and links to community-based innovation. *Relevant for strategy alignment, expert involvement, and applicant communication*

Other resources:

- [Gendered Innovations 2 – European Commission](#): Illustrates how integrating sex, gender and intersectionality leads to higher research quality. Offers examples that strengthen the case for IGIP in strategy and communication. *Relevant for strategic alignment and policy communication*
- [GEAR Tool – European Institute for Gender Equality](#): A comprehensive toolkit for integrating gender equality into research and innovation policy. Includes templates, planning tools, internal structure guidance, stakeholder involvement methods, and communication strategies. *Relevant for all substeps, especially internal capacity, structures, and tool adaptation*
- [LIBRA Project – Gendered Research Content Integration](#): Offers training materials and video resources to support the integration of sex and gender into research content and funding processes. *Relevant for tool development, guidance for applicants, and training formats*
- [SUPERA Project – Gender Equality Tools for Institutions](#): Provides templates and examples for capacity-building, stakeholder engagement, internal learning formats, and long-term planning. *Relevant for internal learning, tool adaptation, and early-stage planning*
- [SSHRC Canada – Equity, Diversity and Inclusion Guidance](#): Presents guiding principles, examples and templates for embedding inclusion throughout the funding lifecycle, with attention to both internal processes and public communication. *Relevant for capacity-building, internal structures, leadership roles, and communication*
- [DSIT UK Guidelines – Gender Equality in Research Funding \(2024\)](#)
A structured national framework for implementing gender equality across funding stages. Emphasises compliance, leadership accountability, and strategic communication. Relevant for strategic alignment, policy framing, and leadership engagement
- [GRANted Project – Bias-Aware Funding Tools](#): Offers practical checklists and templates for identifying and correcting gender bias in call design, reviewer criteria, application formats and assessment processes. *Relevant for tool development, fair review, and communication with stakeholders*

- **Global Research Council – Gender and Funding Case Studies:** An international collection of funder experiences with building inclusion strategies. Provides insight into peer learning, internal awareness-building and collaborative approaches. *Relevant for early capacity-building, expert involvement, and learning culture*

2.2 Step 1: Programming and Budget Allocation

This step is about **laying the groundwork**. You define what your funding programme supports and *who feels addressed*. Programming and budget decisions shape *which topics are taken up, what kind of innovation is encouraged, and who applies*.

At this early stage, you already have powerful tools to shape how inclusive your programme will be. One of the first questions to ask is: **How will we integrate inclusive gendered innovation into our programme design?** You can choose between several approaches:

- **Dedicated calls** focused entirely on inclusion-related challenges (such as gender-responsive mobility or inclusive digital technologies)
- **Mainstreaming**, where inclusion is embedded throughout regular programmes and expected in all funded projects
- **Flagging**, where inclusion is one focus area among several, but not a requirement across the board

Each of these approaches has benefits and challenges:

- **Dedicated calls** offer clear framing and targeted guidance. They are especially useful for building internal capacity, involving external expertise, or testing new tools and formats. However, they are usually limited to specific timeframes or themes and may not reach applicants working in other areas.
- **Mainstreaming** ensures that inclusion is treated as a standard part of research quality across all programmes. It sends a strong institutional message and has the potential for broad impact. At the same time, it requires coordination across units, well-aligned templates and criteria, and support for staff and applicants throughout the funding cycle.
- **Flagging** is a flexible entry point, especially when starting out. It allows you to recognise and encourage inclusive approaches without requiring them in every project. However, it risks staying too vague if not followed by support, examples, or evaluation criteria.

Your organisation may already be using a mix of these approaches, or you may be deciding where to begin. The important thing is to reflect on **what is realistic** given your current resources, structures, and priorities. You can always start small and adapt as you learn. **Budgeting** also plays a key role. If your goal is to reach new or underrepresented actors such as smaller organisations, NGOs, or grassroots networks your funding conditions may need to reflect that. For example, you could allow for smaller grant sizes, simplified processes, or cost coverage for coordination work.

The key message is: **you don't need to have everything figured out from the start.** Every call you design, and every budget decision you make, is a chance to shape the field. Use this opportunity to expand who participates, what topics are explored, and how innovation can serve diverse needs.

After working through this step, you:

- understand how your programming decisions can open or limit possibilities for inclusive innovation
- are able to identify when and why a dedicated call on gender or inclusion makes sense
- can decide whether a thematic or open-topic format is more suitable for your inclusion goals
- know how to design budgets that allow smaller actors and new players to participate
- are aware of practical entry points, like involving gender experts or using existing checklists
- feel more confident in using programming to steer towards societal relevance and inclusion

According to our research, several key **challenges** come up when designing programmes:

Challenges:

- **Inclusion is often misunderstood.** Many people think first of gender balance in project teams. But in the context of research and innovation, inclusion is fundamentally about **who defines the problem, whose needs are prioritised, and who benefits from the outcomes.**
- **Inclusion is seen as an add-on rather than a quality factor.** If it's not clearly linked to impact or excellence, it risks being treated as optional. This can lead to missed opportunities to support co-creation, user engagement, or capacity building within projects.
- **Lack of internal guidance or examples.** Many RFO staff told us they had to figure things out as they went. Without templates, peer exchange, or tested language, it's harder to get started or explain the approach to others.
- **Trying to do too much too soon.** Some organisations attempt to embed inclusion across all programmes from the outset. This can lead to weak or inconsistent implementation. Starting with one focused, well-supported call often works better—especially where experience is still limited.
- **Budget structures can unintentionally exclude new voices.** High co-financing complex forms, or high entry thresholds may discourage smaller

These challenges show how design details can reinforce or undermine your inclusion goals. Below are concrete **actions** RFOs have found useful for inclusive programme design:

- **Start with reflecting who is affected and whether experiences differ by gender/diversity.**
- **Consult experts and bring in gender/inclusion expertise early.**
- **Engage stakeholders:** Talk to affected groups to identify gaps and real needs.
- **Design flexible instruments:** Enable access for smaller organisations; reduce barriers.
- **Signal inclusion clearly:** Include it in programme goals; ideally, make it a assessment criterion.
- **Build internal capacity:** Train your team or involve experienced peers.

Here you find more support

Framing Inclusion at Programme Level

These resources help you reflect on how your programme is set up. They're especially helpful when you're shaping programme goals or updating priorities.

- **Gendered Innovations 2 – European Commission:** This report helps you rethink how research topics and funding priorities are framed by showing how inclusive analysis leads to better results. With 15 detailed case studies and practical methods, it provides inspiration for designing calls that respond to real-world needs like safer cities, inclusive tech, or smarter health solutions.
- **Framing Questions – Gendered Innovations Project:** Helps you rethink how research priorities are set by asking *whose problems are being solved and whose voices are missing*. Useful when developing or revising programme goals, with guiding questions that support more inclusive, relevant, and forward-looking funding strategies.
- **EU Framework for Inclusive Funding:** Encourages you to step back and reflect on how gender and inclusion can be built into your funding programme from the start. Offers practical tips for writing call texts, setting clear expectations, and designing evaluation and budget processes that support inclusion.
- **INSPIRE: Inclusive Gendered Innovation:** This report offers a conceptual foundation for understanding Inclusive Gendered Innovation (IGI). It introduces key definitions, explains why IGI matters for R&I quality and relevance, and outlines how intersectionality can be integrated into innovation systems. The report is especially useful for funders looking to align programme objectives with broader societal needs and build a shared understanding of IGI across teams and stakeholders.

Tools and Templates for Inclusive Calls

If you're drafting a call and want to make it more inclusive, these materials give you concrete starting points - from call text templates to guidance on fair budgeting. They are designed to be adapted, not reinvented.

- [The European Institute for Gender Equality \(EIGE\) Toolkit](#): This toolkit supports funders in making their research funding procedures more gender-sensitive. It helps you during the programming phase by offering guidance on how to set inclusive objectives, integrate gender equality into programme logic, and ensure that funding instruments are accessible to diverse applicants
- [GENDERACTIONplus Guidelines](#): This guideline helps you identify and address structural biases from the very start of the funding cycle. For RFOs, it provides clear, practical advice on how budget decisions, programme priorities, and definitions of excellence can be shaped to reduce gender bias and make funding more accessible to diverse applicants.
- [Guide from the Spanish Institute for Women](#): This guide was developed to help public authorities design funding programmes that actively reduce gender inequalities. It is especially useful in the programming phase, offering concrete questions and examples for defining call objectives, aligning funding priorities with gender equality goals, and ensuring that inclusion is part of the call's purpose from the start
- [Irish Research Council – Gender Strategy Review](#): This independent review of the Irish Research Council's gender strategy helps you reflect on how programme design choices—from applicant guidance to assessment forms and funding flexibility—can shape who applies and how sex/gender issues are addressed in proposals. It offers detailed insights into what worked well, where confusion persists, and how funders can support better engagement through clearer expectations and targeted support.
- [Report from the FORGEN CoP workshop](#): This workshop report helps you reflect on how to embed the sex and gender dimension early in the funding cycle, especially when setting call objectives and preparing application templates. It shares practical examples like internal gender relevance checks, mandatory applicant questions, and review panel guidance, while also addressing common challenges faced by RFOs and offering concrete strategies to build clarity, support, and consistency across the full programme design process.

Learning from Practice

Not sure what works? These resources share how other funders have approached gender and inclusion: what helped, what was confusing, and what made a difference.

- [INSPIRE D3.10 Report: Inclusive Innovation Systems from a Research Funder Perspective](#) (Schiffbänker et al., 2025): Presents comparative findings on how different types of research funding organisations have implemented Inclusive Gendered Innovation Policies in practice. Draws on case studies from Vinnova (Sweden), FFG/FEMtech (Austria), the European Commission, and FONRID (Burkina Faso) to show how IGI can be embedded across diverse organisational contexts, funding structures, and national settings. Useful for RFOs looking for sector-specific reference points when designing or adapting their own programmes.

- **Gender in Horizon Europe:** These guidelines help you understand how gender equality is built into Horizon Europe and show where and how to reflect that in your own funding programmes. They explain what is expected when integrating gender into programme objectives, proposal design, evaluation, and eligibility, making them a practical reference if you want to align national calls with EU standards.
- **EFFORTI Evaluation:** This article analyses three funding and institutional interventions and shows how you can design calls and budget structures that make the integration of gender a visible programme goal. It draws on case studies to illustrate how programming choices such as defining objectives, linking funding to performance, and requiring gender expertise can improve project quality and support long-term institutional change.
- **Sex, Gender, and/or Intersectional Analysis Policies of Major Granting Agencies:** This global overview helps you see how leading funding agencies integrate sex and gender analysis into their programme design and evaluation criteria. It is a useful reference if you're developing your own inclusion policies or want to benchmark your organisation's approach against international standards.
- **GENDER-NET Plus - Report:** The full comparative from GENDER-NET Plus helps you see how RFOs are integrating gender into programming, from setting call objectives to shaping evaluation and budget criteria. version adds a clear overview of hands-on measures like including training as an eligible cost, using guiding questions in calls, and involving gender experts in assessments.

2.3 Step 2: Designing Inclusive Calls

This step is about turning your programme goals into **practical guidance**. A well-designed call tells applicants what kind of innovation is supported, what counts as excellence, and how to align with expectations. It is also the point where applicants first encounter your organisation's approach to **inclusive gendered innovation** and whether it is treated as an integral part of the programme.

Your main tools here are the **call text**, **proposal templates**, and any **guidance materials** you provide. These shape how applicants understand the purpose of the call, what information they include in their proposals, and how those proposals are later assessed. If gender and diversity in research content is not mentioned explicitly, it often won't be addressed - not because applicants are unwilling, but because they assume it isn't required.

Designing inclusive calls doesn't mean adding more complexity. It means **making inclusion part of the structure and intent** of the call. That includes how the challenge is framed, whether it acknowledges diverse users, and how it signals that inclusive research design is part of innovation quality.

You can use different strategies to do this, depending on where your organisation is in the process:

- **Dedicated calls** fully focus on inclusion-related challenges and give space to test tools and expectations.
- **Flagging** inclusion as a desirable criterion within broader calls signals importance.
- **Mainstreaming** embeds inclusion across all calls. This is the most consistent approach but requires coordination and internal capacities in RFOs.

A good place to start is by testing one approach in a specific call. Even a **single sentence in the call objectives or evaluation criteria can start changing applicants' thinking**. Including a prompt in the application form or providing field-specific examples helps them respond more meaningfully—especially in disciplines where inclusion is still new.

Use language that fits your target audience. If you're addressing business-oriented actors in applied sectors, avoid abstract terms and connect inclusion to market relevance, innovation quality, or user responsiveness. This approach makes call texts more concrete and accessible.

Be clear that inclusion isn't about team composition. It's about research content: —whose needs are considered, and who benefits from the results.

To support applicants and reviewers, include **assessment criteria** that reflect this perspective. Based on our findings in the INSPIRE case studies and the European Commission's practice, we recommend using **both qualitative and quantitative criteria**, such as:

- The relevance of gender or other diversity dimensions to the research topic
- The methods proposed to address those dimensions
- Anticipated impact for different user groups or communities

Specific indicators have been suggested in a [policy brief](#):

- No. of Horizon Europe topics that refer explicitly to sex/gender analysis, including intersectional aspects when applicable
- Percentage of the reviewers who have received training on sex/gender analysis and intersectionality provided by the EC
- No. of panels that include at least one gender expert
- Percentage of project proposals that refer to sex/gender and intersectional factors in their research objectives and/or abstracts
- No. of scientific publications resulting from projects funded by Horizon Europe that highlight an inclusive gender analysis in R&I based on keywords
- Case studies/success stories showcasing the integration of an inclusive gender analysis in R&I content, especially in STEM fields and innovation actions

Align language and expectations across your documents. When the call text, proposal template, and reviewer guidance all reinforce the same messages, applicants are more confident and proposals are easier to evaluate fairly.

After working through this step, you:

- understand how **call design** influences whether and how applicants address inclusion
- are able to **signal expectations** clearly through call objectives, structure, and templates
- know when and how to include **field-specific examples** that make gender and diversity dimensions relevant and tangible
- can adapt **proposal formats** to make space for applicants to reflect on gender and inclusion
- feel more confident using the call itself as a **tool to promote inclusive innovation practices**

Our research and interviews with RFO staff show that several challenges tend to come up when designing programmes and allocating budgets with inclusion in mind:

Challenges:

- **IGI is not clearly required in the call text or templates:** Applicants often assume it doesn't apply to them, especially in sectors where gender and inclusion are not usually discussed.
- **Templates don't create space for IGI reflection:** Without a dedicated section in the proposal form, applicants have no clear place to address gender relevance or user diversity, and reviewers have no basis to assess it.
- **Examples are too generic or missing:** Applicants struggle to see what IGI looks like in their field. Vague or checkbox-style responses are common when examples are not tailored to the programme's topic.
- **Calls emphasise technology or commercial goals only:** When innovation is defined purely in technical or market terms, inclusion seems out of place or unrelated to excellence.
- **Internal inconsistencies confuse applicants:** Even if IGI is a programme goal, it may not be reflected across templates, texts, or communication materials. This sends mixed signals and reduces uptake.

These challenges show how design details can reinforce or undermine your inclusion goals. Below are concrete **actions** RFOs have found useful for inclusive call design:

- **Be explicit in your expectations:** Clearly state in the call that reflections on gender and inclusion are expected where relevant. Link this to excellence and impact.
- **Include IGI prompts in templates:** Make space for applicants to reflect on gender relevance and inclusive design in their proposals. A dedicated section or question encourages meaningful responses and gives reviewers a clear basis for assessment.
- **Use inclusive language throughout:** Avoid gendered assumptions. Refer to diverse users, equitable impacts, and inclusive approaches.
- **Offer sector-specific examples:** Provide simple examples to show what IGI looks like in the topic area. This helps applicants respond meaningfully.
- **Coordinate across documents:** Make sure the call text, proposal template, applicant guidance, and reviewer instructions are aligned. Consistency helps clarify expectations and supports both applicants and evaluators.
- **Frame IGI as a quality feature:** Show how IGI contributes to user relevance, societal impact, and innovation quality. This helps shift the view of inclusion from an obligation to an opportunity.

Here you find more support

The following resources support inclusive call design. They help you ensure that inclusion is clearly communicated, structurally embedded, and feasible for applicants to address.

Structuring Inclusive Calls

These resources help you define clear expectations, align internal processes, and reflect inclusion in your proposal templates and assessment criteria.

- **The European Institute for Gender Equality (EIGE) Toolkit:** Outlines how to integrate gender sensitivity into research funding procedures. Includes examples of inclusive call texts, proposal structures, and fair evaluation practices. This resource was developed by the European Institute for Gender Equality.
- **Guide from the Spanish Institute for Women:** Provides hands-on guidance for public authorities to design calls that reduce gender inequalities. Includes practical examples and questions for aligning call objectives with gender goals. This resource was developed by Instituto de la Mujer, Spain.

Integrating IGI into thematic Areas

These materials offer field-specific examples and frameworks to help you tailor IGI expectations across research and innovation areas.

- [Gendered Innovations 2 – European Commission](#): A core EU reference showing how inclusive analysis improves research outcomes. Includes examples in health, AI, energy, and mobility. Supports development of call content, review criteria, and guidance for applicants. This resource was developed by the European Commission.
- [Checklist for Gender-Sensitive Research – EQUAL4EUROPE](#): A practical checklist for assessing gender relevance in research proposals. Helpful for designing application forms or guiding applicant reflection. This resource was developed by the EQUAL4EUROPE project.

Additional Resources to use for your Calls:

These materials help you provide applicants with the clarity and confidence to respond to IGI expectations — especially when inclusion is new in your funding context.

- [Best Practices in Equity and Inclusion – SSHRC Canada](#): Offers inclusive proposal language, examples of strong equity commitments, and evaluation tips. Helps you create clear and encouraging applicant guidance. Developed by the Social Sciences and Humanities Research Council of Canada.
- [Framework for Integration and Evaluation of Sex and Gender - European Commission](#): Presents a structured model to support funders in embedding inclusive gender analysis in research content. Includes policy guidance and criteria for designing calls, proposal templates, and evaluation tools.
- [Review of Irish Research Council Gender Strategy](#): Provides critical reflections on how programme design choices — such as call text clarity, flexibility, or evaluation forms — shape gender integration. Shares what worked well and where adjustments were needed to support applicants and reviewers.

2.4 Step 3: Applicant Guidance and Support

This step is about making **inclusive gendered innovation (IGI)** understandable and achievable for applicants. Once your call is published, applicants need to figure out **what you expect** and **how to reflect IGI** in their proposals. Without clear guidance, even well-intentioned applicants may struggle to see what IGI means in their field or how to respond meaningfully.

Our research shows that applicants come with very different levels of experience. Some have worked with **inclusive methods** for years. Others may be unsure how **gender**, **user diversity**, or **co-creation** relate to their topic. Good guidance makes space for that range. It sets a **shared expectation** and provides enough structure to help people engage, without being overly prescriptive.

This is especially important if IGI is a **formal part of your evaluation**. If applicants don't understand what you're asking for, or see the topic as vague or unrelated, they may skip it or fall back on generic statements. That makes meaningful evaluation hard and undermines the goal of inclusion.

What you provide at this step does not need to be long or complex. A **paragraph in the call text**, a **short guidance note**, or a **linked checklist** can go a long way. Many RFOs also include **practical examples** or refer applicants to **external resources**. These help make the idea of IGI more concrete, especially in scientific or technical fields.

Applicants support also goes beyond written guidance. **Webinars, info sessions, and FAQ updates** are useful tools to clarify expectations and answer questions as they arise. This not only improves proposal quality but also sends a signal that you are committed to supporting inclusion **in practice**, not just in policy.

Use this step to help applicants understand what IGI looks like in your context and how they can respond to it with **relevance, confidence, and creativity**.

After working through this step, you:

- understand why applicant guidance is essential for enabling meaningful reflections on IGI
- can offer basic support materials such as **short explanations, reference examples, or checklists** to help applicants respond confidently
- know how to adjust existing materials to **signal expectations clearly** without creating unnecessary workload
- are aware of different ways to provide light-touch support, including **FAQ entries, info sessions, or clarifications during Q&A**
- are better equipped to make IGI **visible and actionable** without prescribing a one-size-fits-all approach

Supporting applicants on IGI is not always straightforward. Our research with RFOs shows common challenges at this stage:

Challenges:

- **Applicants are unsure what IGI means in their field:** Without examples or concrete guidance, applicants may skip the topic or fall back on vague language that is hard to evaluate.
- **Guidance materials are too general or disconnected from the topic:** When IGI is described in abstract terms, applicants struggle to apply it to their specific research context.
- **Support is provided too late or not at all:** If no guidance is available at the time of submission, applicants are left guessing what is expected and how it will be assessed.
- **Some applicants feel excluded or underprepared:** If IGI is included in the call but no entry points are offered, it can disadvantage those with less experience or fewer institutional resources.
- **Internal capacity to provide support is limited:** RFO staff may lack time, examples, or confidence to give consistent answers to applicant questions about inclusion.

Actions:

- **Set clear expectations from the start:** Briefly explain in the call or guidance what IGI means and why it matters in this programme.
- **Include IGI prompts in proposal templates:** A short, well-placed question can help applicants reflect and gives reviewers something to assess.
- **Offer field-relevant examples:** Show how IGI might apply in your topic area. This helps applicants go beyond generic statements.
- **Refer to existing resources:** Link to checklists, toolkits, or example cases. Applicants often just need a starting point.
- **Use light-touch formats for clarification:** Info sessions, short videos, or FAQ entries can increase clarity without overloading staff or applicants.
- **Coordinate responses internally:** Make sure programme staff, help desks, and reviewers are aligned on how IGI is understood and supported.

Here you find more support

The following resources can help you support applicants in addressing IGI. They offer clear language, structured entry points, and practical tools that make inclusion more accessible.

Helping Applicants Understand What IGI Means

- **Gendered Innovations 2 – European Commission:** A core EU reference showing how inclusive analysis improves research outcomes. Includes examples in health, AI, energy, and mobility. Supports development of call content, review criteria, and guidance for applicants. This resource was developed by the European Commission.
- **Checklist for Gender-Sensitive Research – EQUAL4EUROPE:** A practical checklist for assessing gender relevance in research proposals. Helpful for designing application forms or guiding applicant reflection. This resource was developed by the EQUAL4EUROPE project.
- **INSPIRE: Inclusive Gendered Innovation:** This report offers a conceptual foundation for understanding Inclusive Gendered Innovation (IGI). It introduces key definitions, explains why IGI matters for R&I quality and relevance, and outlines how intersectionality can be integrated into innovation systems. The report is especially useful for funders looking to align programme objectives with broader societal needs and build a shared understanding of IGI across teams and stakeholders.
- **Proposal Guidelines: IGI – J-PAL / Poverty Action Lab:** Provides step-by-step instructions for applicants on how to design inclusive projects and reflect on user needs. Useful when you want to offer a structured entry point for IGI without prescribing a fixed model.

Creating Clear and Supportive Applicant Materials

These resources can be adapted for guidance notes, templates, or FAQs to help applicants understand and respond to IGI expectations.

- **Best Practices in Equity and Inclusion – SSHRC Canada:** Offers inclusive proposal language, examples of strong equity commitments, and evaluation tips. Helps you create clear and encouraging applicant guidance. Developed by the Social Sciences and Humanities Research Council of Canada.
- **Framework for Integration and Evaluation of Sex and Gender - European Commission:** Presents a structured model to support funders in embedding inclusive gender analysis in research content. Includes policy guidance and criteria for designing proposal templates and evaluation tools.
- **Guide from the Spanish Institute for Women:** Provides hands-on guidance for designing calls that reduce gender inequalities. Includes practical questions and examples that can be shared with applicants.

Learning from Experience:

These resources reflect how other funders have approached IGI and where applicants needed more clarity or support.

- **Report from the FORGEN CoP workshop:** Presents practical examples of how RFOs embed gender considerations into calls. Includes strategies like internal gender relevance checks, mandatory applicant questions, and reviewer guidance. Also highlights common challenges in communicating IGI.

2.5 Step 4: Reviewer Selection and Panel Composition

This step is about choosing **who evaluates the proposals** and **what perspectives** they bring to the table. Even the best-designed call can fall short if the review panel is not equipped to assess the **integration of gender and diversity dimensions** or if key perspectives are missing during the assessment process.

Reviewers influence how excellence is defined. If they are unfamiliar with gender and diversity considerations in research content, or if there is no expectation that it matters, proposals that address gender and inclusion meaningfully may not be fully recognised. When the panel is aligned with the programme's values, proposals that reflect gender and inclusion are more likely to be fairly assessed.

Selection often focuses on disciplinary expertise and seniority. While both matter, they don't always guarantee to reflect diverse perspectives. In our research we found that including reviewers who are familiar with **gender analysis, inclusive innovation, or user engagement** strengthens the panel's capacity to evaluate gender and diversity dimension.

One effective strategy is to assign a specialised reviewer with expertise in gender and inclusion to assess all proposals across the panel. This "horizontal reviewer" brings consistency and ensures that inclusion is evaluated meaningfully, rather than left to disciplinary experts who may not feel confident in this area.

Panel diversity also shapes the tone and credibility of evaluation. Gender balance, career stage diversity, and varied institutional backgrounds can help broaden what is understood as high-quality research and innovation. This is especially relevant when proposals use **interdisciplinary, co-creative, or challenge-driven approaches.**

This step is not about ticking boxes. It is about ensuring that reviewers reflect the **goals and values** of your programme, and that they are able to assess proposals accordingly.

Later steps will cover **reviewer briefing** and **evaluation criteria (Step 5)** and the **assessment process and decision-making (Step 6 and 7)**. This step is about **who is selected** to take part in the process in the first place. Use this step to shape a panel that supports **fair, informed, and inclusive decision-making.**

To avoid repetition across steps, **all key sources, case examples, and tools related to reviewer selection, briefing, and assessment will be bundled and made available after Step 7.**

After working through this step, you:

- **understand how reviewer selection affects uptake of gender and diversity dimensions:** You can reflect on how the composition of your panel supports or hinders inclusive assessment.
- **are able to include relevant perspectives in the panel:** You know how to look for expertise in gender analysis, inclusive methods, or user engagement alongside disciplinary knowledge.
- **can apply diversity goals to panel composition:** You are aware of the value of gender balance, mixed career stages, and broader representation.
- **can align reviewer profiles with programme goals:** You ensure those selected are familiar with or open to assessing the kinds of inclusion your call encourages.
- **are more confident selecting reviewers who support inclusive evaluation:** You take steps to create panels that reflect what your call stands for.

Challenges:

- **Panels lack relevant expertise:** Reviewers may not have experience with gender analysis, inclusive design, or co-creation, which makes it harder to evaluate related aspects in proposals.
- **Selection focuses narrowly on technical expertise:** Prioritising only disciplinary reputation can unintentionally exclude those with inclusion-related knowledge or perspectives.
- **Diversity is not considered in panel composition:** Without attention to gender balance, career stage, or institutional variety, review panels may reflect a narrow view of excellence.
- **Inclusion is not discussed during selection:** If IGI is not explicitly part of reviewer selection criteria, inclusion is less likely to be recognised as a quality feature.
- **The same reviewers are reused without reflection:** When panels are formed from the usual pool, it can reinforce established norms and limit openness to new approaches.
- **Uncertainty about which diversity matters most:** Funders may want balanced panels but are unsure how to weigh factors like gender, expertise, or background in relation to the call's goals.

These actions can help ensure that the people evaluating proposals are aligned with your inclusion goals and equipped to assess IGI meaningfully.

Actions:

- **Include gender and inclusion expertise in reviewer selection. Note relevant experience or demonstrated openness to assessing inclusion in research content.**
- **Look beyond seniority and discipline. Consider reviewers with knowledge of gender analysis, inclusive methods, or user engagement—especially for content-driven calls.**
- **Assign a specialised reviewer to assess inclusion across all proposals. This “horizontal reviewer” ensures consistency and supports panels where disciplinary reviewers may not have specific IGI expertise.**
- **Build balanced panels. Aim for diversity in gender, career stage, institutional background, and geographic representation where relevant.**
- **Signal expectations early. Let reviewers know that inclusion is part of the programme’s goals and will be assessed in the review process.**
- **Track your reviewer pool over time. Keep note of who brings gender and inclusion expertise to build institutional memory and improve future selection.**
- **Coordinate across teams. Align reviewer nomination practices with broader inclusion goals and programme strategies.**

2.6 Step 5: Reviewer Briefing and Evaluation Criteria

This step is about making sure that **reviewers are well prepared** to assess inclusive gendered innovation (IGI) once the proposals are in. Even if the right people are on the panel, they still need **clear guidance** on what to look for, how to recognise quality, and how IGI fits into the overall evaluation.

Reviewers rely on the tools and instructions you give them. If IGI is not included in the evaluation form or not mentioned in the briefing, they may assume it is not part of the assessment. This is especially true when IGI is still **new or unfamiliar** in the field.

Clarity and consistency matter. If your call encourages applicants to consider gender and inclusion, that same expectation should be reflected in the **scoring criteria, evaluation questions, and any supporting materials.** Otherwise, reviewers are left to decide for themselves whether it matters.

This step is not about turning reviewers into experts. It is about giving them **just enough structure** to apply the criteria fairly. That can include **short explanations, guiding questions, or examples** of what a good response might look like. It can also include advice on how to handle **weak or missing responses**.

Use this step to support your reviewers with the **tools and language** they need to recognise and reward **inclusion as part of research and innovation quality and excellence**.

After working through this step, you:

- **understand why briefing reviewers matters for IGI:** You are aware of how small adjustments in tools and instructions can support more consistent assessment.
- **know where to reflect IGI in your evaluation process:** You can identify which forms or rubrics to adapt.
- **can provide reviewers with basic guidance:** You are able to share clear, lightweight materials that help reviewers engage with IGI.
- **are better prepared to respond to reviewer uncertainty:** You have examples or prompts ready if reviewers ask how to assess IGI relevance.
- **can improve the alignment between call expectations and assessment:** You ensure that what is encouraged in the call is also visible in the review process.
- **feel more confident that IGI won't be overlooked in scoring:** You have built in reminders that help reviewers take inclusion into account.

Our findings show that small gaps in guidance can lead to confusion, inconsistency, or missed opportunities to recognise inclusion:

Challenges:

- **IGI is not reflected in evaluation criteria:** If it's not built into forms or scoring, reviewers are unlikely to consider it.
- **Briefings are too general or too short:** Without examples or prompts, reviewers may not understand what IGI looks like.
- **Reviewers lack confidence in assessing IGI:** Supportive reviewers may hesitate if they're unsure how to judge responses.
- **Inclusion is treated as optional or unclear:** Vague instructions can make IGI seem unrelated to research quality.
- **Internal alignment is missing:** Mixed messages from staff or documents create inconsistent expectations.
- **Examples are too generic or missing:** Reviewers struggle without field-relevant illustrations of what to look for.
- **Time pressure reduces attention to IGI:** Reviewers may skip or skim this part if it feels unclear or unfamiliar.

These actions can help reviewers assess IGI more confidently and consistently, without adding complexity to the review process.

Actions:

- **Reflect IGI in evaluation forms and criteria:** Make sure inclusion is visible in scoring, rubrics, or qualitative guidance.
- **Include short prompts in reviewer materials:** Add a sentence or question to help reviewers consider gender relevance or user diversity.
- **Share practical examples where possible:** Field-specific illustrations help reviewers recognise what IGI can look like in practice.
- **Use briefings to clarify expectations:** A few minutes in a panel meeting or a note in the instructions can shift how IGI is understood.
- **Explain how to assess weak or missing responses:** Reviewers need to know what to do when IGI is poorly addressed or ignored.
- **Coordinate guidance across your team: Align messaging in forms, emails, helpdesks, and panel meetings to avoid mixed signals.**

2.7 Step 6: Assessment Process and Decision-Making

This step is about how **review panels assess and reach their decisions**. It focuses on what happens during meetings, when proposals are compared, scores are discussed, and final funding recommendations are made. Even with strong preparation, **inclusive gendered innovation (IGI)** can be overlooked if it is not actively considered during this stage.

Panel discussions have strong impact on what gets funded. If the gender dimension is not raised or clearly valued, it may not shape the final outcome. This can disadvantage proposals that approach innovation through user diversity, social relevance, or inclusive design.

You can't script every conversation, but you can help **structure the process**. This includes reminding panel chairs that IGI is part of what should be assessed, encouraging space for reflection in discussions, and making sure that **final scores and justifications** reflect the values outlined in your call.

Trade-offs are part of the process. A proposal may be strong on inclusion but receive questions on feasibility. Reviewers may find it difficult to compare very different types of excellence. Panels need room and clarity to navigate these discussions in a fair and informed way.

What gets recorded matters. If Inclusive Gendered Innovation is discussed but not included in the written summary, that insight is lost. You can support this by including a specific section in the review form that asks whether gender and diversity dimensions have been adequately addressed. This could be a yes/no checkbox with a short explanation field. Even without a dedicated score, this field creates a consistent space for reviewers to reflect on inclusion.

If your programme treats Inclusive Gendered Innovation as a central objective, you may also consider assigning a specific score to this aspect of the proposal. Doing so shifts responsibility for weighting inclusion from individual reviewers to the call design itself and sends a strong signal about its relevance to research quality.

These kinds of structured feedback fields can serve multiple purposes: they help provide applicants with meaningful inputs and offer your organisation valuable insights for future monitoring and improvement.

Use this step to ensure that your **decision-making process reflects the intent** of your programme and recognises Inclusive Gendered Innovation as a meaningful part of research and innovation quality.

After working through this step, you:

- **understand how panel discussions affect IGI uptake:** You can recognise when and how inclusion gets considered during final decisions.
- **can support panel chairs in guiding inclusive discussion:** You know how to flag IGI as a valued aspect of research quality.
- **are able to align scores with call expectations:** You ensure that scoring reflects what the programme asks applicants to deliver.
- **can document inclusion in evaluation summaries:** You have formats or prompts that help capture IGI-related insights.
- **are better prepared for trade-offs during decision-making:** You understand how to navigate tensions between different dimensions of quality.
- **can strengthen consistency across panels:** You use small changes to encourage fairer, more aligned decisions.

Choosing the right reviewers is not only a technical task. Small decisions around panel composition can strongly affect how inclusion is assessed in practice:

Challenges:

- **IGI is not raised during panel discussion:** Reviewers may notice inclusion in individual assessments but not bring it up in the final conversation.
- **Panel chairs are unsure how to handle IGI:** Without guidance, chairs may avoid the topic or steer discussion back to more familiar criteria.
- **Scoring does not reflect inclusion goals:** Even strong IGI proposals may receive lower scores if reviewers are not confident weighing different aspects of quality.
- **Inclusion-related feedback is lost in documentation:** IGI may be discussed but not recorded in evaluation forms or funding rationales.
- **Panels struggle with trade-offs between criteria:** Reviewers may disagree on how to value IGI when balanced against feasibility, risk, or novelty.
- **No space for reflection in panel process:** If discussion is rushed or tightly scripted, there may be no time to reflect on inclusion.

These actions help ensure that IGI is part of how quality is discussed, scored, and reflected in final decisions.

Actions:

- **Brief panel chairs on IGI expectations:** Let them know inclusion is part of what should be addressed in the discussion.
- **Include prompts in panel materials:** Add short reminders to consider IGI when comparing or scoring proposals.
- **Adapt evaluation templates and forms.** Include a dedicated field asking whether IGI has been adequately addressed (yes/no), with space for comments.
- **Use scoring where relevant.** If IGI is central to your call, consider assigning a specific score to this section of the proposal to ensure its meaningfully weighted.
- **Support consistent scoring decisions:** Use simple scoring guidance to help reviewers apply IGI criteria with confidence.
- **Allow time to reflect on inclusion:** Build in space for panels to weigh IGI alongside other dimensions of quality.
- **Encourage transparency in decisions:** Clarify how inclusion is factored into outcomes, especially when proposals are close in score.
- **Use skilled facilitation to support balanced discussion.** Structured techniques can help surface diverse viewpoints, manage disagreement, and reduce the dominance of louder voices.

2.8 Step 7: Funding Decisions and Feedback

This step is about how **funding decisions are made and communicated**. It focuses on how proposals are selected for funding, how inclusion is considered in the final stage, and what kind of feedback applicants receive.

Final decisions reflect your programme's values. Even if IGI is assessed during evaluation, it may not influence outcomes unless it is clearly factored into the selection process. Applicants notice when inclusion efforts are ignored in the final result.

Selection and feedback should align with the call. If IGI was part of the objectives, it should be visible in the funding rationale. This helps ensure transparency and avoids sending mixed signals.

Feedback helps shape future proposals. Applicants take cues from what is mentioned in the outcome letters. If IGI was strong, they should know it was appreciated. If it was missing, they should receive encouragement and guidance for improvement.

This is also a point of trust-building. Clear communication and consistent criteria help applicants see your organisation as credible and supportive of inclusive innovation.

Use this step to make sure that **final decisions and feedback reinforce what your programme stands for**, including inclusive gendered innovation as a part of research excellence.

After working through this step, you:

- **understand how funding decisions reflect inclusion goals:** You know what to look for when reviewing alignment between evaluation results and selection outcomes.
- **can ensure IGI is considered in the final selection:** You are able to check that inclusion is visible in the funding rationale or decision summaries.
- **are equipped to give clear feedback to applicants:** You provide constructive comments that reflect the programme's values, including IGI.
- **can explain how inclusion shaped outcomes:** You feel confident describing how IGI was factored into decisions when asked by applicants or stakeholders.
- **support fairer, more transparent communication:** You help reinforce trust by giving applicants insight into how decisions were made.

Even when IGI is assessed during evaluation, it can be lost during the final funding stage. Applicants notice when inclusion is left out of decisions or feedback:

Challenges:

- **Inclusion is not reflected in selection outcomes:** IGI may be discussed in reviews but ignored when funding lists are finalised.
- **Feedback omits comments on IGI:** Applicants who addressed inclusion receive no signal that their effort was noticed or valued.
- **Final decisions are based on narrow definitions of excellence:** Societal relevance or user diversity is overlooked if selection favours only technical or commercial criteria.
- **No space to justify how inclusion influenced decisions:** Decision records or templates do not prompt discussion or explanation of IGI-related factors.
- **Mixed signals undermine credibility:** When IGI is encouraged in the call but absent in decisions, applicants lose trust in the process.
- **Staff feel unsure about what feedback to give:** Without examples or clear expectations, programme officers may avoid commenting on IGI altogether.

These actions help make sure that funding outcomes and feedback reflect your programme's inclusion goals and support learning for the next round:

Actions:

- **Include IGI in funding discussions:** Make space in decision meetings to reflect on how inclusion was assessed and whether it influenced outcomes.
- **Check alignment between decisions and call objectives:** Review whether proposals selected for funding reflect the inclusion goals of the programme.
- **Adapt templates for decision rationales:** Add a prompt to record whether and how IGI contributed to the selection.
- **Make IGI visible in applicant feedback:** Acknowledge when it was well addressed and encourage further development when missing.
- **Use simple, encouraging language:** Help applicants see IGI as a meaningful part of quality, not just a compliance item.
- **Coordinate feedback across teams:** Ensure consistency between decision letters, helpdesk responses, and reviewer comments.

Here you find more support for inclusive Review Processes

These resources can support Research Funding Organisations in selecting, preparing, and guiding reviewers to meaningfully assess the integration of gender and diversity in research content.

- [Inclusive Funding: Guideline for Research Funding Organisations – GENDERACTIONplus](#): Provides concrete steps for research funding organisations to design and implement funding programs that actively mitigate gender bias and promote inclusivity. Offers practical guidance on integrating IGI into funding decisions and feedback mechanisms.
- [Gender-Sensitive Research Funding Procedures - EIGE](#): Guidelines for incorporating gender-sensitive practices in research funding. Includes suggestions on selecting diverse reviewers and preparing them to evaluate IGI.
- [Practical Guide to Improving Gender Equality in Research Organizations – Science Europe](#): Offers strategies for research organisations to integrate gender equality into their operations. Includes best practices for reviewer training and evaluation criteria to ensure fair assessment processes.
- [A gender-equal process: A qualitative investigation of the assessment of research grant applications 2023](#) (Swedish Research Council): Based on observations from 14 review panels in 2023, this report provides qualitative evidence on how gender equality plays out in actual grant assessment meetings. It documents panel dynamics, discussion patterns, and decision-making practices, and describes concrete improvements achieved through ongoing observation since 2012. Useful for RFOs reviewing or developing their own assessment processes and quality assurance practices.
- [UN Women – Evaluation Handbook: How to Manage Gender-Responsive Evaluations](#): This handbook provides detailed guidance on managing evaluations that are responsive to gender considerations. It includes participatory tools for stakeholder consultation and strategies for including women and vulnerable groups in the evaluation process.
- [UNICEF – Guidance on Gender Integration in Evaluation](#); This comprehensive guide outlines a "how-to" approach for integrating a gender lens into evaluations. It addresses the importance of considering gender norms and discrimination throughout the evaluation process to ensure that outcomes are gender-transformative.
- [Gendered Innovations 2 – European Commission](#): Includes field-specific examples that show how IGI strengthens research quality. Useful for briefings, evaluation handbooks, or guiding reviewers.
- [Adaptation Fund - Gender Guidance Document](#): Outlines how to integrate gender in review and implementation processes. Offers considerations for assigning responsibilities and supporting decision-makers.
- [GEECCO - Guidelines for Jury Members and RFO Employees](#): Offers targeted advice on how reviewers and RFO staff can integrate gender considerations into proposal assessment. Includes guiding questions and criteria to support fair and inclusive evaluation. Developed by the GEECCO Horizon 2020 project.
- [GENDER-NET – Guidelines for Evaluators](#): Offers structured guidance and a detailed checklist for reviewers assessing the integration of sex and gender analysis in research

proposals. Helps funders and peer reviewers evaluate inclusion across all research phases.

- **GENDER-NET Plus – Policy Brief on Promoting Gender Equality in Research Funding:** This policy brief emphasizes the importance of mandatory gender equality and diversity training for reviewers. It provides actionable recommendations for research funding organizations to promote gender equality throughout the funding process, including reviewer training and evaluation panel composition.
- **Women and Science Committee - Spanish National Research Council (CSIC):** Institutional body promoting gender equality in research. Offers recommendations for improving gender balance and awareness in evaluation panels.
- **DFG – Checklist for Assessing the Relevance of Sex, Gender, and Diversity in Research:** The German Research Foundation (DFG) provides a checklist to help reviewers determine the necessity of including information about sex, gender, and diversity in research proposals. It serves as a starting point for evaluating the integration of these aspects in research planning.
- **CIHR – Reviewer Guidance and Training Modules:** The Canadian Institutes of Health Research (CIHR) offers a suite of resources to assist reviewers in evaluating the integration of sex and gender in health research. These include online training modules, decision trees, and videos that provide guidance on assessing sex as a biological variable and gender considerations in research proposals.
- **SSHRC Canada - Best practices in equity, diversity and inclusion in research practice and design;** Provides reviewer guidance, inclusive language tips, and equity frameworks for proposal evaluation. Useful for designing fair and informed assessment processes.
- **Guidelines for Gender Equality in the Research Funding Process – Swedish Research Council:** Outlines comprehensive measures to ensure gender equality throughout the research funding process, including planning, training, review panel composition, and decision-making. Emphasises the importance of equal gender distribution in review panels and the prevention of unconscious bias.
- **UNODC – Gender-Responsive Evaluation Toolkit:** The United Nations Office on Drugs and Crime (UNODC) offers a toolkit that provides guidance on integrating gender considerations into evaluations. It includes checklists and tools to assess the extent to which interventions have incorporated gender equality principles.
- **Gender Equality Results and Case Studies – Asian Development Bank:** Presents lessons from evaluation practice, including how to incorporate gender into scoring, analysis, and performance review.

2.9 Step 8: Monitoring and Reporting

This step is about how your organisation monitors what gets funded and how inclusion is reflected in programme outcomes. It covers how you collect data, document progress, and report on the uptake of inclusive gendered innovation (IGI) across different stages of the funding cycle.

Monitoring helps you understand whether your programme goals are being met. It shows whether IGI is being taken up in proposals, which applicants are engaging with it, and how inclusion appears in the funded portfolio. Without this information, it is difficult to track progress or identify gaps.

Monitoring and reporting go beyond compliance. They offer an opportunity to ask meaningful questions about what kinds of innovation are being supported, who benefits, and whether your programme is helping shift thinking and practice within the research and innovation ecosystem.

You can start small. For example, by tracking how applicants respond to IGI-related prompts, noting how often reviewers comment on inclusion, or documenting examples from funded projects. These insights can then feed into future programming, call design, or reviewer briefing.

Monitoring also supports internal coordination. It helps teams reflect on where inclusion is well integrated, where expectations may still be unclear, and what kinds of support applicants or reviewers need to meet your goals. Over time, this strengthens your organisation's capacity to embed inclusion consistently.

Use this step to make inclusion visible in your funding data and decisions. The focus here is on tracking outcomes, reporting what you observe, and creating a clearer basis for strategic reflection.

After working through this step, you:

- **know how to monitor IGI in funded projects.** You are able to collect and organise basic information on how inclusion is addressed in applications and project outcomes.
- **can identify trends and reporting gaps.** You can spot where inclusion is being taken up, where challenges remain, and where reporting can be improved.
- **are equipped to document examples.** You know how to gather concrete insights from proposals, reviews, or panel discussions to inform internal and external reporting.
- **can strengthen internal coordination.** You use monitoring findings to improve alignment across teams, templates, and guidance.
- **help build a foundation for strategic reflection.** Your data and documentation contribute to ongoing review and quality development

Monitoring and learning often receive less attention than selection and evaluation. But without structured reflection, inclusion efforts remain hard to track and improve:

Challenges:

- **No system for tracking IGI uptake.** Many funders do not collect consistent data on how gender and diversity dimensions are addressed in applications or reflected in funded projects.
- **Monitoring responsibilities are unclear.** Without a designated lead or process, follow-up on inclusion often gets overlooked or becomes fragmented.
- **Data is considered too sensitive or complex.** Teams may hesitate to collect information on gender, users, or inclusion due to privacy concerns or lack of appropriate tools.
- **Insights are not captured systematically.** Observations from reviewers or programme teams often stay informal or siloed, making it hard to inform future improvements.
- **Feedback loops are weak or missing.** Information from past calls is not always used to update call design, guidance materials, or reviewer briefings.
- **Reporting focuses narrowly on outputs.** Internal summaries may highlight quantitative metrics but overlook relevance, inclusion, or social impact.

These actions help you build a feedback culture and strengthen IGI integration over time without needing complex systems.

Actions:

- **Track IGI across proposals and outcomes:** Record how applicants respond to IGI prompts and whether inclusion is reflected in funded projects.
- **Review panel summaries and comments:** Look for how IGI was assessed and whether it influenced scoring or discussion.
- **Collect examples from funded projects:** Capture real cases of inclusive innovation to inform future calls and support learning.
- **Assign responsibility for monitoring:** Make sure someone is clearly tasked with tracking IGI uptake and reporting findings.
- **Adapt reporting formats to include IGI:** Add prompts or fields to help teams document inclusion-related insights consistently take it easier to document inclusion-related insights at each stage of the process.
- **Frame data collection carefully:** Explain why inclusion data is needed and how it will support programme improvement, not individual evaluation.
- **Use findings to adjust calls and guidance:** Feed learning from previous rounds into future design, criteria, and support materials.

Here you find more support

These resources support efforts to track, reflect on, and improve how inclusion is integrated into your funding programmes. They offer tools and benchmarks for learning across calls and systems.

- [Towards a Common Understanding of the Gender Dimension – GENDERACTIONplus:](#) Presents findings and policy recommendations on gender integration across national and regional systems. Includes monitoring suggestions and benchmarks.
- [GENDER-NET Plus D6.2 – Comparative Analytical Report:](#) Offers an analysis of gender equality policies in RFOs, focusing on tracking and comparing how IGI is implemented and monitored across countries.
- [GENDER-NET Plus D6.2 – Integration of Gender Research in Assessment:](#) Presents selected actions and reviewer-oriented measures to improve how gender and inclusion are considered and followed up in assessment and reporting
- [Framework for the integration and evaluation of inclusive gender analysis in research and innovation content](#) (ERA Forum Subgroup / European Commission, 2025): Provides structured guidance to national authorities and RFOs on policy measures for the effective implementation and evaluation of the gender dimension in research and innovation content from an intersectional perspective. This is directly applicable for RFOs designing or updating their monitoring and evaluation frameworks.

3.10. Step 9: Learning and Continuous Improvement

This step is about how your organisation learns from experience and builds on it—before, during, and after the funding cycle. It focuses on how you reflect across calls, respond to feedback, and strengthen internal processes over time to better embed inclusion.

Continuous improvement makes inclusion sustainable. It helps your team build on what works, address gaps, and stay responsive to changes in the research ecosystem. This includes reflecting not just on application and review stages, but also on post-award implementation: What was actually funded, how it was carried out, and what results emerged.

Learning happens at all levels. It includes reviewing how calls performed, gathering input from applicants and reviewers, and understanding what staff need to feel confident and supported. It also includes collecting evidence of how integrating IGI has influenced project directions or outcomes. These examples strengthen the case for IGI internally and shift its perception from a compliance task to a quality criterion.

This step is not about more bureaucracy. It is about small, regular practices that keep learning alive. From internal debriefs and template updates to post-project reviews, sharing good examples, or running peer exchanges. These actions build capacity and clarity over time.

It also helps build **institutional resilience**. Organisations that reflect and adapt are better prepared to improve, respond to change, and apply lessons across different teams and programmes.

Use this step to embed IGI into your organisation's way of working, including follow-up on funded projects. Structured learning across calls and cycles supports meaningful and lasting improvement.

After working through this step, you:

- **Can reflect on IGI across the full funding cycle:** You understand how inclusion was taken up not only during application and review but also in project implementation and outcomes.
- **Understand how to collect feedback from key actors:** You are able to gather input from applicants, reviewers, funded teams, and colleagues to support structured reflection.
- **Can identify and share good practice:** You know how to collect and highlight examples where IGI made a difference, helping to inform future calls and internal learning.
- **Are equipped to adapt tools and processes:** You feel confident making evidence-based updates to templates, guidance, or reporting formats.
- **Help reposition IGI as a strategic value:** You support a culture where inclusion is seen not as a checkbox, but as a meaningful driver of research quality and relevance.

Continuous learning often takes a back seat to delivery. But without structured reflection, it is hard to sustain or scale inclusive practices:

Challenges:

- **No time or capacity to reflect:** Teams move quickly from one call to the next, leaving little room for review or improvement.
- **Learning stays informal or undocumented:** Insights remain with individuals and are not shared across teams or cycles.
- **Feedback is collected but not used:** Input from applicants or reviewers is gathered but not fed into programme updates.
- **Inclusion efforts are not reviewed systematically:** IGI is not part of standard evaluation or performance discussions.
- **Teams lack confidence to adapt tools:** Staff are unsure what can be changed or improved and stick with familiar formats.
- **Good practices are not shared internally:** Examples from one call or programme do not reach others who could benefit.
- **Post-award learning is overlooked:** Once funding decisions are made, few processes exist to review how inclusion played out in the actual projects.
- **IGI is perceived as secondary:** If inclusion is seen as less important than scientific or technical criteria, reflection on IGI is likely to be deprioritised or neglected.

These actions help you turn everyday experiences into learning that strengthens inclusion over time:

Actions:

- **Set aside time for internal reflection:** Hold short debriefs after each call or funding cycle to capture what worked well, where IGI could be better supported, and how processes can improve.
- **Collect structured feedback from all key actors:** Use short surveys or guided conversations with applicants, reviewers, and funded teams to understand how IGI was addressed - or overlooked.
- **Review tools and templates with inclusion in mind:** Update call documents, guidance, and review forms based on what was confusing, missing, or particularly effective.
- **Follow up on funded projects:** Include post-award check-ins or reporting prompts to explore how IGI was implemented in practice and what outcomes it shaped.
Gather evidence of IGI's added value: Document cases where gender and diversity considerations strengthened research outcomes or enhanced project relevance.
- **Share learning across teams and programmes:** Make sure good examples and insights don't stay siloed - bring them into onboarding, planning, and cross-departmental exchange.
- **Encourage open conversations about challenges:** Create safe spaces for staff to reflect honestly, raise difficulties, and test small-scale improvements.
- **Track and communicate changes over time:** Keep a simple record of what has been updated, why, and whether it leads to clearer expectations or better inclusion results.

3. Glossary for Inclusive Gender Equality - for Research Funders and Practitioners

This glossary has been developed to support users of **INSPIRE's Support Package 5** by providing a **clear and consistent reference** for key terms related to **gender equality in research and innovation**. It is intended for a **broad range of stakeholders**, including staff in research funding organisations, programme designers, policy officers, evaluators, and other professionals working to strengthen inclusive approaches within research systems.

Across institutions and countries, many concepts associated with **equality, diversity, and inclusion** are used in **different ways**. While some terms are embedded in legislation or institutional strategies, others have emerged more recently through academic work or policy initiatives. These differences can lead to confusion, especially when implementing funding programmes and evaluation criteria, or when designing gender equality plans.

The glossary responds to this challenge by offering a **shared language** that supports the **practical application** of relevant terms. It has been developed through an **iterative process** involving literature review, policy analysis, and contributions from members of the **INSPIRE Community of Practice**. As a result, it reflects both **conceptual foundations** and the **practical realities** faced by organisations aiming to promote gender equality in research.

This is a **living document**: The terminology, its usage, and the surrounding policy environment are continuously evolving. Discussions within the Community of Practice contributed to updates and refinements, helping ensure that the glossary remains **current, practical, and responsive to new policy developments**.

In addition to clarifying terminology, the glossary contributes to a shared understanding of **approaches which integrate gender and inclusion** in research and innovation content. It supports the application of frameworks developed within INSPIRE such as **Inclusive Gendered Innovation (IGI)** and **Inclusive Gendered Innovation Policies (IGIP)**, which promote the integration of **sex, gender, and intersectional analysis** into research content and funding procedures.

The selected terms capture **structural aspects of inequality** as well as **practical tools for implementation**. For example, entries such as **Bias, Diversity, and Intersectionality** address underlying societal and institutional dynamics. Other terms, such as **Sex, Gender and Diversity Analysis (SG&DA)**, offer guidance for implementation.

The definitions are based on **established academic and policy sources**, including those from the **European Commission, the European Institute for Gender Equality (EIGE)**, and research carried out within the **INSPIRE project**. This ensures that the glossary offers both **conceptual clarity and practical relevance**.

Each entry in the glossary includes **(1)** a short definition of the term, **(2)** references to related concepts, **(3)** an explanation of how the term connects to broader approaches that promote inclusion and gender equality in research and innovation content.

Relevance to INSPIRE project

INSPIRE aims to advance inclusive gender equality in R&I systems by supporting institutional change through co-creation, knowledge sharing, and practical implementation tools. One of INSPIRE's aims is to strengthen the uptake of inclusive approaches throughout the R&I landscape. To this end, the project offers a series of support packages, each addressing specific aspects of transformation.

Support Package 5 focuses on how inclusive gendered perspectives can be integrated into the research and the funding cycle. These two cycles are central organising principles of SPK5:

- The **research and innovation cycle** - from idea development, analysis, and co-design to implementation and dissemination - is addressed in **Chapter 2** ("For Applicants and Innovators: HOW to do Inclusive Gendered Innovation?").
- The **funding cycle** - from programming, call design, and applicant support to review, decision-making, and monitoring - is covered in **Chapter 3** ("For Research Funders: HOW to design, implement and embed Inclusive Gendered Innovation Policies").

The glossary complements this package by helping users engage with its content through a shared vocabulary that underpins the key concepts, tools, and approaches introduced in these chapters.

By clarifying concepts that are central to equity, diversity, and inclusion, the glossary fosters more consistent communication between different actors involved in programme development, policy formulation, and evaluation. It supports shared understanding across disciplines, institutions, and national contexts, contributing to INSPIRE's broader goal of embedding intersectional and inclusive approaches in research and innovation systems.

Target Audience

This glossary aims to support a wide range of users engaging with Support Package 5. While its initial focus lies with research funding organisations, it is equally relevant for researchers, policymakers, evaluators, and practitioners aiming to apply inclusive and gender-sensitive approaches in the R&I ecosystem.

How to use this Glossary

This glossary serves as a practical reference for users of Support Package 5 and can be consulted at different stages of the **research** and **funding cycles**.

Each entry includes...

- **a brief definition** written in clear, accessible language
- **connections to related terms** that highlight overlaps or distinctions
- **relevance to gender-inclusive research and funding practices**

3.1 Why Language matters for Policy and Practice

The words used in research and innovation are never neutral. **Terminology shapes how institutions define problems, identify priorities, and make decisions.** It plays a central role in shaping who is included in conversations, which perspectives are heard, and how change is pursued. This is particularly important in the context of gender equality, where language can either reinforce exclusion or promote visibility and fairness.

For the **INSPIRE** project, which aims to strengthen inclusive gender equality in research and innovation systems, language plays a strategic role. As part of a broader effort to support institutional transformation, **INSPIRE promotes the use of inclusive and gender-sensitive language as a tool for change.** When the language used in guidelines, evaluations, and calls reflects inclusive values, it sends a message about what matters and who belongs.

Based on research, this glossary reflects the following points:

- 1) **Terms related to gender, diversity, and inclusion carry both political and normative weight.** They are never just descriptive; they reflect values and influence action. Using precise and inclusive language contributes to a shared understanding of what equity means in practice and helps create a common ground across diverse institutional and national contexts.
- 2) **Inclusive language also supports clarity, accessibility, and fairness.** When terminology is consistent and culturally sensitive, it improves communication for everyone. This contributes to institutional transparency and helps align policy messages with the values they are intended to promote.
- 3) **Gender-sensitive language supports inclusion by avoiding bias and by recognising all gender identities.** This includes moving away from generic masculine forms such as “he” or “chairman,” which studies have shown reinforce male-centered assumptions and make other identities less visible (Stahlberg et al., 2007; Stout & Dasgupta, 2011). When institutions adopt gender-fair language, they help foster environments where more people feel acknowledged, respected, and invited to participate.
- 4) **Language shapes perceptions of roles, expertise, and opportunity.** Research shows that even subtle wording can activate gender stereotypes or discourage engagement. For instance, statements like “*girls are as good as boys at science*” still frame boys as the benchmark, implicitly reinforcing unequal norms (Chestnut & Markman, 2018). Similarly, funding calls or job advertisements using masculine-coded language (e.g. “competitive,” “dominant,” “driven”) tend to dissuade women from applying (Gaucher et al., 2011). These effects show how wording influences not only how inclusive a process appears, but also impacts who participates and how decisions are made.

Language is not only a mirror of institutional culture; it is a driver of it. It shapes how policies are received, how credible they appear, and how effectively they can be implemented. By choosing inclusive terms, institutions enhance both legitimacy and impact.

Understanding Core Concepts for Inclusive Change in Research and Innovation

Clear and shared language is essential for advancing change in research and innovation. Terms like **equality, inclusion, diversity, and intersectionality** are often used together, but they have different meanings and are applied in different ways. This can lead to confusion or weaken their impact in practice.

This glossary builds on two frameworks developed in the project, **Inclusive Gendered Innovation (IGI)** and **Inclusive Gendered Innovation Policy (IGIP)**.

We also explore **four concepts commonly used** by policy-makers, researchers, and practitioners working for more inclusive research systems. Drawing on insights from the Community of Practice and ongoing policy debates, we highlight how these concepts relate to one another in terms of their goals, methods, and practical application.

Reflections from the Community of Practice

Throughout the INSPIRE Community of Practice (CoP), the use of terminology has been a recurring topic of discussion. The following reflections highlight how language both enables and complicates efforts to foster more inclusive research and innovation systems from the perspective of our CoP members:

Language shapes access and legitimacy: CoP members observed that terms like diversity, inclusion, or intersectionality carry different meanings across national, cultural, and institutional contexts. In some settings, diversity is strongly linked to gender or disability. In others, it includes a broader set of dimensions such as socioeconomic background or disciplinary variety.

Balancing complexity and accessibility: A recurring challenge identified in the CoP was the balance between conceptual precision and practical usability:

- **Intersectionality** was valued for its analytical strength, especially in revealing how overlapping factors like gender, race, and class shape innovation outcomes. However, funders often found it difficult to operationalise e.g., struggling to translate intersectional insights into clear application criteria or evaluation rubrics.
- **Inclusion** was considered more intuitive and broadly appealing, used as a guiding principle in programme design and stakeholder engagement. *Yet some criticised it for being too vague - prompting questions like “who exactly should be included?” and “how do we measure inclusive practice?”*

Context matters: CoP members observed that the relevance of terminology depends on who is using it and for what purpose. Academic and advocacy communities may draw on critical or theoretical language, while research funding organisations or policymakers may favour terms that align with institutional routines and expectations;

- For example, diversity is often used in formal strategy documents, whereas equity or intersectionality may be more prominent in scholarly or activist spaces.

Terminology can trigger resistance: Some CoP members noted that certain terms evoke discomfort or resistance, especially when they are perceived as politically charged or imposed. This can create barriers to engagement or collaboration, particularly when stakeholders feel unfamiliar with the language or uncertain about its implications. In these cases, clarity, context, and inclusive communication were seen as essential for building shared understandings.

Language is dynamic: There was broad agreement that terminology evolves as institutions and communities learn from practice. New terms emerge, meanings shift, and usage adapts to changing contexts. CoP members welcomed the glossary as a space where this evolution can be documented, discussed, and made more accessible to those working across disciplines and roles.

3.2 Frameworks developed in INSPIRE: IGI and IGIP

The reflections above underscore how language plays a pivotal role in enabling (or constraining) inclusive change across research and innovation systems. Yet as discussions within the Community of Practice have shown, shared terminology alone is not enough. Institutions also need clear frameworks that help translate inclusive values into concrete practices.

This is where the concepts of **Inclusive Gendered Innovation (IGI)** and **Inclusive Gendered Innovation Policies (IGIP)** come in. Developed within the INSPIRE project, these frameworks aim to strengthen gender equality through deeper integration of intersectional perspectives in both research and innovation content and the systems that fund and govern them (Karaulova et al, 2023).

These concepts build upon, but also go beyond, existing EU frameworks by addressing structural power dynamics, promoting co-creation with diverse stakeholders, and supporting a systemic transformation approach. Together, they offer a practical roadmap for embedding inclusion and gender equality not only in what research is done—but in how it is shaped, supported, and assessed.

Inclusive Gendered Innovation

Inclusive Gendered Innovation (IGI) refers to the *integration of sex, gender, and intersectional analysis throughout the entire research and innovation process*. It moves beyond traditional equality measures by embedding gender perspectives in reflections on how knowledge is produced, technologies are developed, and innovations are delivered. IGI acknowledges that **innovation does not occur in a vacuum** but is shaped by broader social structures, power relations, and institutional norms (Karaulova et al., 2023).

The IGI approach aims to ensure that innovation processes consider how gender and intersecting inequalities influence access, participation, and impact of research agendas,

knowledge production, innovation outcomes, and the institutional systems that support them. It includes a focus on involving a diverse range of stakeholders in research and design. IGI *"mainstreams sex, gender and intersectional analysis in the R&D and innovation development processes aiming at promoting inclusive gender equality"* (Karaulova et al., 2023, p. 12).

What distinguishes IGI from more traditional gender mainstreaming or diversity initiatives is its commitment to **structural transformation**. It does not treat gender and diversity dimensions as add-on or isolated variables, but as a constitutive element of quality research and responsible innovation. This perspective resonates with work by Schiebinger and Schraudner (2011), who have long emphasised the need to incorporate gender analysis as a driver of excellence in science and technology.

Inclusive Gendered Innovation Policy

Inclusive Gendered Innovation Policy (IGIP) provides the strategic and institutional scaffolding necessary to implement IGI. IGIPs encourage the integration of intersectional sex, gender, and diversity analysis (SG&DA) through formal mechanisms such as legislation, policy strategies, targeted funding calls, and evaluation criteria. In this way, they enable and normalise inclusive practices across the entire research and innovation funding cycle.

An important contribution of IGIP is its role in translating RFOs' abstract commitments to gender equality into **concrete institutional practice**. By embedding gender considerations into calls, funding criteria and assessments, IGIPs promote a shift from compliance-based approaches toward more systemic and reflexive models of change. IGIPs are therefore not static policies but part of dynamic and ongoing transformation processes, evolving alongside emerging knowledge and institutional needs.

At the level of Research Funding Organisations (RFOs), **IGIPs may involve...**

- defining, standardising and using SG&DA-related terms
- including gender criteria in application and assessment templates
- offering training for applicants and evaluators for SG&DA
- conducting regular monitoring and evaluation activities (Karaulova et al., 2023)

Relation to other Concepts and Frameworks

While IGI and IGIP were developed within INSPIRE, they relate to and expand upon other established frameworks in the European research policy landscape.

- **Sex, Gender and Diversity Analysis (SG&DA)** is a central concept within Horizon Europe. It supports the systematic integration of sex, gender, and other diversity dimensions in policy design (Hunt et al., 2022).
 - IGI is consistent with SG&DA (Sex, Gender, and Diversity Analysis) but goes further by addressing structural conditions like institutional power dynamics,

systemic biases in funding and evaluation processes, and the norms that shape knowledge production. It also puts a stronger focus on stakeholder engagement throughout the research process and aims explicitly at transformative change within research and innovation systems.

- **Inclusive Gender Analysis (IGA)**, as introduced by the ERA Forum Subgroup on Gender Equality, aims to ensure that gender analysis includes intersectionality and contextual sensitivity (European Commission, 2025).
 - The **IGI** framework **shares these goals and complements them** by placing stronger emphasis on **embedding inclusive analysis across entire innovation systems**, including governance, funding structures, and decision-making processes.
- **Responsible Research and Innovation (RRI)** also contributes to the conceptual foundation of IGI. Both frameworks share an emphasis on anticipation, inclusion, and responsiveness.
 - However, IGI places a sharper focus on the **integration of intersectional gender analysis as a quality criterion** — not only within research content but also in the design of innovation processes, including funding practices and stakeholder engagement mechanisms.
- **Intersectionality-Based Policy Analysis (IBPA)**, although more commonly applied in public policy contexts, shares a concern with the ways policies affect different social groups differently.
 - IGIP resonates with this approach by recognising institutional contexts and promoting policy tools that enable equality-oriented change

3.3 Linking IGI to core Concepts: Equality, Inclusion, Diversity, Intersectionality

The core concepts of **equality**, **inclusion**, **diversity**, and **intersectionality** are foundational to Inclusive Gendered Innovation (IGI) and Inclusive Gendered Innovation Policies (IGIP). While often used together in policy and practice, each concept carries a specific analytical and normative meaning.

Equality

Equality refers to the principle that *all individuals should have the same rights, responsibilities, and opportunities*. In the context of research and innovation, this means eliminating systemic and institutional barriers that prevent specific groups from participating equally in funding, decision-making, or knowledge production processes (European Commission, 2021).

Importantly, equality is more than equal treatment. It also encompasses **substantive equality**, which calls for proactive and corrective measures to address structural disadvantages and

unequal starting conditions. This understanding is central to the **EU's Gender Equality Strategy**, which emphasises not only fair treatment but also tackling the root causes of inequality such as biased institutional norms, uneven access to resources, and unequal decision-making power. It also underpins **IGI's transformative approach to structural change**, which focuses on changing the rules, processes, and cultures of research and innovation systems — for example, by revising funding procedures, integrating intersectional gender analysis into evaluation criteria, or promoting inclusive governance structures.

Inclusion

Inclusion involves creating conditions in which all individuals and groups, particularly those historically marginalised, can actively participate, contribute, and influence outcomes. Inclusion requires more than simply ensuring that different people are present. It also means that institutional cultures, procedures, and norms support full engagement and respect for diverse knowledge and perspectives (European Commission, 2020).

In the context of IGI, inclusion focuses on embedding the voices and needs of underrepresented groups into the research and innovation process itself. It supports collaborative models of knowledge production that enable co-design and co-ownership of both problems and solutions.

Diversity

Diversity refers to the presence and representation of different identities, backgrounds, and experiences within a particular setting. This includes characteristics such as gender, age, ethnicity, disability, sexual orientation, nationality, and socio-economic status (EIGE, 2024). Diversity is a visible marker of institutional openness and responsiveness.

However, representation alone does not ensure transformation. When diversity is not accompanied by inclusive cultures and equality measures, structural inequalities may persist. IGI responds to this by framing diversity as an active resource for innovation rather than a passive demographic outcome. Diversity in knowledge production, when it comes to research content, means taking into account diverse perspectives and user needs so that innovation outcomes benefit broader segments of society.

Intersectionality

Intersectionality provides a framework for understanding how various forms of inequality, such as racism, sexism, ableism, and classism, intersect and compound each other. Coined by Crenshaw (1989), the concept has since become a central analytical tool in both academic and policy contexts for examining how overlapping identities affect people's access to opportunities and resources.

In the current European Research Area (ERA) policy context, intersectionality is gaining visibility as a guiding principle for responsible and inclusive research. It is explicitly cited in EU gender equality and research agendas as a requirement for effective and just innovation systems (European Commission, 2023). IGI integrates this perspective by encouraging

institutions to move beyond single-axis approaches and to design policies and practices that recognise complexity and address structural disadvantage at multiple levels.

Interlinking Concepts: From Analysis to Action

The concepts of **equality**, **diversity**, **inclusion**, and **intersectionality** we just outlined are often discussed together, yet they capture distinct aspects of systemic change.

- **Equality** refers to fairness in outcomes, often requiring differentiated treatment to overcome structural disadvantage.
- **Diversity** highlights the presence of varied identities and experiences, while
- **Inclusion** speaks to the quality of participation and the conditions that enable it.
- **Intersectionality** offers a lens for understanding how multiple social categories such as gender, race, class, and ability interact to shape individual and group experiences of discrimination or privilege.

These concepts are **interdependent but not interchangeable**.

- **Diversity** without **inclusion** can result in symbolic representation without influence.
- **Equality** without **intersectionality** may flatten experiences and reinforce existing hierarchies.

Together, these terms support a more comprehensive understanding of how to build equitable and responsive research and innovation ecosystems. They underpin the conceptual foundation of **Inclusive Gendered Innovation (IGI)** and **Inclusive Gendered Innovation Policies (IGIP)**, which require not just attention to representation, but a structural rethinking of how systems include, value, and respond to difference.

Reflections from our Community of Practice

Members of the INSPIRE CoP emphasised the importance of **clarity and usability** when working with these concepts. While CoP members widely supported the ambition to embed intersectionality and inclusion, they also noted that these terms are often used inconsistently across institutional contexts and national settings. In some organisations, “**diversity**” has become an umbrella term, while others use “**equality**” primarily in the legal or procedural sense, with limited attention to lived experience or systemic barriers.

Several CoP members raised the need to **balance conceptual precision with accessibility**. For example, the term **intersectionality** was seen as crucial but at times challenging to translate into operational guidance without oversimplifying. Others pointed out that inclusion efforts must go beyond participation metrics and address whether institutional cultures are enabling or marginalising.

The discussions revealed a shared understanding that these terms, while analytically distinct, **must be used in a mutually reinforcing way** to avoid fragmented efforts.

With this shared conceptual foundation in place, the following section offers the glossary of key terms. These entries aim to clarify usage, support implementation, and promote shared understanding across roles and institutions.

3.4 The Glossary of key Terms

The following glossary builds on the shared conceptual foundation introduced in Chapter 2 and brings together the terms most relevant for promoting **inclusive and intersectional approaches** in research and innovation (R&I). It serves as a practical companion to the frameworks of **Inclusive Gendered Innovation (IGI)** and **Inclusive Gendered Innovation Policy (IGIP)** developed within the INSPIRE project and supports their implementation through clearly defined and consistently used terminology.

Each entry provides:

- a concise and accessible **definition**,
- links to **related concepts** that help position the term within broader debates, and
- an explanation of its **relevance for inclusive practice** in R&I systems.

All terms are accompanied by reliable **policy or academic sources** to facilitate further exploration or alignment with existing institutional practices.

The following table presents the glossary in a structured, easily accessible format:

Term	Definition	Relation to Other Concepts	Relevance for IGI(P)
Gendered Innovation (European Commission 2020)	The application of sex and gender analysis to improve research design, technological development, and innovation outcomes.	Closely related to SG&DA, as it translates analytical insights into research and innovation practices. While it primarily focuses on improving research content through sex and gender analysis, it complements IGI by providing a strong foundation. IGI builds on this work and extends it toward broader systemic transformation.	Serves as a conceptual and methodological basis for IGI by demonstrating the added value of integrating sex and gender in innovation content. Supports the rationale for IGIP by showing policy relevance of inclusive research results.
Sex, Gender and Diversity Analysis	A methodological framework used to assess how sex, gender, and diversity shape research	Builds upon intersectionality and underpins Gendered Innovation by providing concrete analytical tools. It supports IGI by offering	Forms the analytical core of IGI.

(Hunt et al., 2022)	processes and outcomes, and how to integrate these insights meaningfully.	a structured approach to analysis and aligns with IGI as a criterion for responsible funding.	IGIP relies on SG&DA to embed inclusive evaluation practices, funding requirements, and policy standards.
Gender Dimension in R&I (European Commission, 2020)	The integration of sex and gender analysis in the design, implementation, and evaluation of research and innovation.	Closely tied to SG&DA and Gendered Innovation; whereas SG&DA is a broader analytical framework and includes diversity dimensions, the gender dimension refers specifically to how gender considerations are analysed and integrated into R&I practices. Often operationalised via gender criteria in funding programs.	IGI embeds the gender dimension across all stages of the innovation process. IGIP promotes its integration through formal requirements in funding calls, evaluator training, and project assessments.
Inclusive Gendered Innovation (Karaulova et al., 2023)	A systemic approach that embeds sex, gender, and intersectional analysis into research and innovation content and processes, including stakeholder participation and structural change.	Integrates SG&DA and expands upon Gendered Innovation by combining analytical depth with institutional change. Serves as the foundation for IGIP and is grounded in intersectionality and inclusion.	A concept guiding transformative research practice. It informs the design, evaluation, and delivery of inclusive and reflective innovation systems.
Inclusive Gendered Innovation Policy (Karaulova et al., 2023)	Institutional policy approach aimed at supporting IGI by embedding inclusive practices through funding structures, application design, assessment criteria, and organisational capacity.	Provides the governance backbone for IGI. Builds on gender mainstreaming and formalises the role of SG&DA. Translates conceptual commitments into actionable structures.	Establishes enabling conditions for IGI by making inclusive innovation a requirement, not an option, within research funding and policy environments.
Equality (EIGE, 2024)	The state in which all individuals have the same status, rights, and opportunities regardless of gender, race, or other characteristics.	Anchored in legal and policy frameworks; conceptually distinct from equity, which addresses structural conditions needed to realize equality.	Equality is a long-term goal of IGIP; IGI contributes to it by ensuring equal access to knowledge, participation, and innovation benefits.
Gender Equality (EIGE, 2024)	The state in which individuals of all genders have equal rights, responsibilities, and opportunities in all spheres	A specific form of equality focused on gender; closely linked to equity, gender mainstreaming, and gender balance. Gender equality is both	Gender equality is a foundational objective of IGIP. IGI contributes by embedding gender considerations in the design

	of life. It implies that the interests, needs, and priorities of all genders are equally valued and considered.	a goal and a benchmark that other concepts such as inclusion and intersectionality help to achieve.	and outcomes of R&I, ensuring that innovations reflect and serve all genders fairly.
Equity (McMaster University, 2024)	Acknowledges existing structural inequalities and seeks to address them by allocating resources and support based on individual or group needs.	Closely related to equality but emphasises outcomes and structural redress; complements diversity and inclusion by focusing on fairness of process and access.	Equity underpins IGIP implementation by informing policy design that targets systemic imbalances in research and innovation environments.
Diversity (McMaster University, 2024)	The representation of different identities, experiences, and perspectives within a group or institution, including gender, race, ability, etc.	Often treated descriptively (e.g. team composition); requires inclusion and equity measures to be meaningful; intersects with intersectionality when examining compounded status.	IGI ensures that diversity shapes not only team makeup but also research content and outcomes; IGIP fosters structural inclusion of underrepresented voices.
Inclusion (McMaster University, 2024)	An active process of creating environments in which all individuals feel respected, valued, and able to contribute meaningfully.	Dependent on both diversity and equity to be effective; inclusion without structural change can lead to tokenism; links to co-creation and participation.	IGI places inclusion at the centre of innovation design; IGIPs support inclusion through evaluation criteria, participation formats, and funding mechanisms.
Intersectionality (Crenshaw, 1989)	An analytical framework examining how multiple social identities (e.g., gender, race, class) intersect to produce unique experiences of inequality.	Cross-cuts all other concepts; sharpens analysis of discrimination, exclusion and power structures; underused operationally but central for understanding systemic inequalities.	IGI and IGIP are grounded in intersectionality as a critical lens for analysing how systems of privilege and disadvantage affect innovation processes and access.
Bias (Greenwald & Krieger, 2006)	Implicit or explicit prejudices that shape attitudes and decisions, often unconsciously. Bias can lead to systemic exclusion in professional settings.	Underpins discrimination and stereotypes; rarely acknowledged in institutional practice; reinforces unequal opportunities.	IGIP addresses bias by implementing fair processes, guidance, and training to mitigate its effects in research design and evaluation.

Discrimination (EIGE, 2024)	Unjust treatment of individuals based on characteristics such as gender, race, or age. Can occur across institutional structures and interactions.	Rooted in structural bias and exacerbated by intersecting identities; closely linked with inequality and exclusion.	IGIP counteracts discrimination through inclusive policy design, anti-bias procedures, and criteria that support equitable access.
Equal Opportunities (EIGE, 2024)	Principle that everyone should have the same chance to access resources, roles, and rights, regardless of identity or background.	Closely linked to equity and equality; focuses on access, while equity addresses structural conditions and support needed to reach it.	IGIP advances equal opportunities through inclusive funding frameworks, fair evaluation, and targeted support for marginalized applicants.
Equal Representation (Council of Europe, 2022)	Fair presence of different social groups, especially across gender, in institutions, processes, and decision-making bodies.	Intersects with gender balance and diversity; differs from inclusion in that it is quantitative rather than experiential.	IGIP calls for equal representation to make innovation governance reflective of wider society, ensuring decisions are informed by diverse lived experiences.
Gender Stereotypes (EIGE, 2024)	Preconceived ideas about gender roles and behaviors that limit individuals' choices, contributions, or recognition.	Supports bias and discrimination; reinforces exclusion; linked to lack of representation and tokenism.	IGIP challenges gender stereotypes through training, unbiased evaluation, and inclusive communication in research and innovation environments.
Gender Balance (EIGE, 2024)	Proportional representation of all genders in a given setting, especially in leadership and decision-making roles.	Related to equal representation and equality; supports inclusion by ensuring gender diversity is reflected structurally, not just symbolically.	IGIP promotes gender balance to ensure that innovation systems benefit from varied perspectives and avoid male-dominated structures in decision-making.
Gender Mainstreaming (Council of Europe, 2022)	Strategy for systematically integrating gender perspectives into all stages of policy, program, or project development.	Linked to gender equality, inclusive policies, and intersectionality; focuses on institutional transformation rather than isolated measures.	IGIP uses gender mainstreaming to embed gender considerations in all phases of research funding and innovation processes, making inclusion structural.

<p>Gender Equality Plan / GEP (European Commission, 2021)</p>	<p>A strategic document adopted by research-performing or funding organisations outlining institutional objectives, actions, and measures to advance gender equality.</p>	<p>Closely connected to gender mainstreaming and inclusive policies; GEPs serve as a vehicle to operationalise gender equality and integrate SG&DA into institutions. Their scope is broader than IGI, but they enable its adoption.</p>	<p>GEPs create the enabling conditions for IGIP by establishing organisational responsibility for integrating gender and fostering inclusive innovation environments.</p>
<p>Gender Pay Gap (EIGE, 2024)</p>	<p>The difference in average gross hourly earnings between women and men across the economy. It reflects inequalities in the labour market, including occupational segregation, part-time work, and unpaid care responsibilities.</p>	<p>Closely tied to precarity, work-life balance, and gender equality. It serves as an indicator of structural discrimination and unequal valuation of work.</p>	<p>IGIP frameworks acknowledge the gender pay gap as a structural barrier in R&I careers. Addressing it supports inclusive research careers and equitable participation in innovation.</p>
<p>GEP Requirement (European Commission, 2021)</p>	<p>A mandatory condition under Horizon Europe for public bodies, research organisations, and higher education institutions in EU Member States and associated countries to have a Gender Equality Plan (GEP) in place to be eligible for funding.</p>	<p>Connected to gender mainstreaming, inclusive policies, and institutional transformation. Operationalises gender equality at the organisational level.</p>	<p>The GEP requirement embeds IGIP principles in practice, pushing institutions to implement gender-related policies and structures. It sets a baseline for systemic change in research governance.</p>
<p>Work-Life Balance (EIGE, 2024)</p>	<p>The equilibrium between professional responsibilities and personal life, enabling individuals to fulfil both without compromising well-being or career progression.</p>	<p>Intersects with gender equality, inclusion, and precarity. Work-life balance is especially relevant for addressing gendered career gaps and unequal caregiving burdens.</p>	<p>IGIP addresses structural conditions affecting participation in R&I; promoting work-life balance enables more inclusive innovation careers and reduces gendered attrition.</p>
<p>Positive Action Measures (Council of Europe, 2022)</p>	<p>Targeted strategies and policies that aim to overcome historical or structural disadvantages experienced by underrepresented groups, including temporary preferential treatment.</p>	<p>Linked to equity and anti-discrimination approaches; complements equality by recognising that equal treatment may not be enough to correct inequalities.</p>	<p>IGIP may employ positive action to redress systemic exclusion in R&I funding or leadership roles, thus accelerating structural change.</p>

<p>Precarity (OECD, 2021)</p>	<p>A condition of unstable or insecure employment and income, often affecting early-career researchers and disproportionately impacting women and marginalised groups.</p>	<p>Tied to intersectionality, inclusion, and work-life balance; precarious conditions undermine equality and innovation potential.</p>	<p>IGIP must consider how funding structures may perpetuate precarity, and take steps to support sustainable, inclusive research careers.</p>
<p>Inclusive Research Careers (GENDER-ACTIONplus, 2023)</p>	<p>Research career pathways that are accessible, equitable, and supportive of all individuals, regardless of gender, ethnicity, ability, or family status. They are designed to eliminate structural obstacles to entry, progression, and leadership.</p>	<p>Intersects with work-life balance, gender equality, and intersectionality. Builds on concepts such as fair recruitment, mobility, and career flexibility.</p>	<p>IGI aims to transform R&I ecosystems by promoting inclusive career conditions. IGIP enables this through funding criteria, mentoring, and policy incentives.</p>
<p>Nonlinear research careers (GENDER-ACTIONplus, 2024)</p>	<p>Career paths in research that do not follow a traditional, uninterrupted trajectory. They may include career breaks, sectoral transitions, or changes in pace due to caregiving, health, or personal choices.</p>	<p>Related to inclusion, gender stereotypes, and intersectionality. Challenges traditional meritocracy and productivity metrics.</p>	<p>IGIP recognises the need for flexible funding structures that account for diverse career trajectories. IGI values nonlinear paths as enriching to innovation and representation.</p>
<p>Research assessment (CoARA, 2022)</p>	<p>The processes and criteria used to evaluate research quality, impact, and merit. Traditional models focus on outputs like publications, while reform efforts stress openness, societal relevance, and inclusivity.</p>	<p>Tied to inclusive research careers, equity, and gender equality. Can perpetuate biases if narrowly defined; needs alignment with diversity and inclusion values.</p>	<p>IGIP supports research assessment reform by integrating gender and diversity indicators. IGI benefits when assessment frameworks value collaborative, transdisciplinary, and inclusive work.</p>

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