Guidelines for considering gender

Introduction

Gender is a fundamental cross-cutting topic for improving the quality and societal relevance of research outcomes. Thus, the production of gender-inclusive and responsive research is core to the SHARED GREEN DEAL's RRI vision and guiding principles.

The gender dimension is closely related to each of the dimensions that guide the understanding of responsibility at SHARED GREEN DEAL and the day-to-day project work. Analysing project processes and activities with a gender lens will allow for better actions for 1) **including** the perspectives of all relevant stakeholders; 2) evaluating and **reflecting** on the project work and adapting research methods; 3) anticipating (un)intended impacts of the research process; and 4) responding to the priorities, needs and capabilities of all involved stakeholders. This implies, for example, identifying and addressing potential (gendered) barriers to participation for groups that have been excluded from deliberative and participatory processes.

According to the EU RRI policy framework[1], the integration of the gender component in responsible research and innovation processes encompasses the implementation of transformative actions that, on the one hand, lead to gender balance (through an increase in the participation of women) in research teams and decision-making bodies and, on the other hand, strengthen the gender dimension in the research content. There is a vast body of work aimed at achieving structural change in research institutions towards gender equality that has resulted in the formulation of comprehensive guidelines, tools and indicators, such as the GENOVATE toolkit "Promoting Sustainable Change- A Toolkit for Integrating Gender Equality and Diversity in Innovation in Research Systems", the INTEGER "Guidelines for Gender Structural Change in Higher Education and Research Organizations", or the recommended resources for gender equality of the RRI Tools Project.

In order to measure the effects of each RRI key, the most widely used concept is referred to as MoRRI indicators, which were developed in the project "Monitoring the Evolution and Benefits of Responsible Research and Innovation – MoRRI"[2]. While giving a good overview of the status and evolution of the integration of the RRI dimensions in Europe, the MoRRI indicators focus on the national level in order to achieve policy changes in member states that lead to greater social benefits, and thus, their use to measure change and evaluate practices at the project level at a project level is challenging. Additionally, the literature is scarce when it comes to integrating the gender component into research content and everyday research practices[3].

For this reason, after carrying out an extensive review of existing materials and assessing their relevance and possibilities for adaptation to the needs of the SHARED GREEN DEAL project, WECF developed this toolbox aiming to provide **consortium members and local partners** with compre-

1 Archibugi, D., et al., 2015. The Contribution of Science and Society (FP6) and Science in Society (FP7) to Responsible Research and Innovation. A Review. Conference on Science, Innovation and Society: achieving Responsible Research and Innovation. 19-21 November 2014, Rome, Italy.
2 Viola, P., et al., 2018. *Monitoring the evolution and benefits of responsible research and innovation: Summarising insights from the MoRRI project.* Brussels: European Commission.
3 Bührer, S., Wroblewski, A., 2019. The practice and perceptions of RRI—A gender perspective. *Evaluation and Program Planning*, 77(101717), 1-10.

hensive guidelines for the integration of gender in the project activities, which will result in raised awareness and the necessary strengthening of gender competence. In Section 2, this guide offers some basic concepts and insights on gender and three main approaches on how to integrate gender into research processes. Section 3 focuses on guiding consortium partners (Section 3.1) and local partners (Section 3.2) through the process of gender integration, thereby helping them examine and actively address gender-differentiated needs, expectations, and realities.

Key concepts

In order to ensure that the gender perspective is adequately addressed throughout the project activities, it is crucial to create awareness for gender-related topics in order to reach gender mainstreaming (achieving gender equality through the process of systematically recognising and taking into account gender issues within all areas and at all levels of core activities of projects and programmes' cycles). Therefore, this section is divided into three sections to understand gender-related concepts, gender inequalities, and gender integration approaches.

What is gender?

Gender is a sociocultural construct that describes society's ideas about the roles, responsibilities, behaviours, attributes as well as (self-) identity of women, men, and gender-diverse people. These perceptions determine what is expected and allowed for each gender in a given context, influencing social relations and power dynamics (between genders). Gender is produced, learned, and maintained through social processes and can vary significantly across cultures and change over time. Gender differs from **sex**, as the latter refers to a person's biological attributes, the physical, anatomical, and physiological differences that distinguish a person as male, female, or intersex.

Note that gender does not exist in isolation but interacts with other categories such as age, class, race, religion, or migration status. The interconnection between those identity categories is known as i**ntersectionality**[4]. The concept describes how gender inequalities intersect and overlap with other social and economic disparities to create unique experiences of privilege or disadvantage for a person or a group.

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4   Crenshaw, K., 1989. Demarginalizing the Intersection of Sex and Race. A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics, *University of Chicago Legal Forum*, 1989(1), 8.

Box I: *Three dimensions crucial to the definition of gender*

Gender norms refer to the attitudes, roles and behaviours deemed appropriate for women, men and gender-diverse individuals. They are **produced** through social institutions and interactions.

Gender identity reflects an individual's perception, experience and presentation of their gender, which **may or may not** align with their birth-assigned sex.

Gender relations explain how gender shapes **social interactions** in private and public settings and determines, for instance, the distribution of power and the access to and control over resources. Thus, gender produces and reproduces hierarchies and inequalities in society.

Concepts for understanding gender inequalities

Gender inequality refers to unequal access to or enjoyment of rights, freedoms, and opportunities for women, men or gender-diverse people[5]. Gender inequalities are determined by social, cultural or legal norms and affect all areas of life. Three concepts help us to analyse how gender inequalities operate in a society: gender bias, gender gaps and gender blindness.

Box II: *Concepts related to gender inequalities*

Gender bias describes any prejudiced situation in which one gender is favoured over another. Gender bias encompasses **gender stereotypes** (beliefs leading to generalisations that reduce an individual's identity to specific roles and behaviours based on their gender) and **gender discrimination** or the systematic, unfavourable treatment of individuals based on their gender, which denies them rights, opportunities and/or resources.

Gender gap(s) describes any disproportionate disparity in the conditions of women and men, as well as other gender identities, due to their position or role in society. E.g. gaps in terms of participation, opportunities, rights, power to influence and make decisions, incomes and benefits, and control and use of resources or time.

Gender blindness means failing to recognise and acknowledge that roles and responsibilities are gendered and assigned in specific social, cultural, economic, and political contexts.

Gender Integration Approaches

Incorporating gender into research design and implementation has proven to enhance the quality and validity of the research. Gender analysis adds new dimensions to research that favour interpretation, validation, reproducibility, and generalisability of the findings,[6] thereby providing more benefits to society.

5   European Commission, 2004. *Toolkit on Mainstreaming Gender Equality in EC Development Cooperation.* Brussels: EuropeAid Cooperation Office and the European Commission Directorate-General for Development.
6   Tannenbaum, C., Ellis, R.P., Eyssel, F., Zou, J., Schiebinger, L., 2019. Sex and gender analysis improves science and engineering. *Nature*, 575(7781), 137–146. DOI: 10.1038/s41586-019-1657-6.

The integration of gender in research requires the equal participation of women and diverse gendered individuals in research as well as incorporating the gender dimension in the research content. Gender is a key analytical and explanatory variable that should be considered in the strategic (establishing priorities) and operative (e.g. question formulation, research design, data collection, interpretation, and dissemination of results) stages.

There are different levels at which gender can be integrated into ruling out gender disparities and bringing in gender mainstreaming. Based on how much weightage has been given to gender as a cross-cutting aspect or interwoven in the process, three levels of integration have been created.

Box III: *Levels of gender integration*

The **Gender-sensitive approach** acknowledges gender as a relevant variable in research and aims to identify differences between genders but does not address gender inequalities. It is usually operationalised through the gender/sex disaggregation of data.

The **Gender-responsive approach** acknowledges and considers differential gender needs, roles and access to resources. It relies on gender analysis to build an understanding of gender-unequal outcomes.

The **Gender-transformative approach** analyses and addresses the causes of gender-based inequalities and works to transform gendered roles, norms and power relations.

The SHARED GREEN DEAL's social experiments must ensure that the carried-out activities are **at least gender sensitive**. It is also important to assess to what extent the social experiment can be implemented using a gender-responsive or transformative approach. For that, in this toolbox, we provide our local partners and consortium members with ideas and reflection tools to facilitate the integration of the gender approach. By providing guiding questions, we aim to raise awareness of a wide range of actions that can be considered in daily work to respond to gender concerns. Moreover, the answer to the questions will help our partners to assess the degree to which they are incorporating one or the other approach **towards gender integration (sensitive, responsive, transformative)** and in which areas they could **still reflect more** and improve. The guiding questions will also set the baseline to assess concrete actions during our workshop on gender integration.

Gender integration in SHARED GREEN DEAL

In order to integrate gender into our project and processes and actively work against gendered inequalities, we are presenting to you our gender guidelines. You can learn about gender integration for consortium members in Section 3.1 or directly jump towards Section 3.2, where the guidelines address our local partners. Whilst the checklist for reflecting upon planning and implementing gender-just social experiments is mainly directed towards local partners, consortium members will benefit from reviewing the questions in order to guide their partners towards a gender-sensitive, gender-responsive, and/or gender-transformative approach.

Gender guidelines for consortium members

SHARED GREEN DEAL's consortium is committed to promoting **gender equality** at all project levels and all stages. As stated in our RRI guiding principles, "we recognise that **gender equality** adds value to research and innovation in terms of excellence, creativity, and societal relevance of the

knowledge produced."[7] In line with this conviction, we strive to reach an internal gender balance and have integrated the following principles:

1. We promote equal opportunities for women and men and gender balance in the teams in academic and non-academic partner organisations.

2. We ensure the inclusion of women´s expertise in the project's internal structures, including managing positions (WP leads), general assembly, and advisory boards.

Actions and measures to adhere to these principles were carried out during the setting up of the consortium and formally incorporated within the project's Project Management Handbook in the form of the Gender Action Plan. Nevertheless, compliance with these principles is not a tick-box exercise that focuses on achieving a particular share of women and men in the project but is instead a commitment to integrating their expertise and knowledge that should be enhanced and observed during the project implementation.

> **To enhance our commitment to gender equality at all project levels and stages, SHARED GREEN DEAL:**
>
> • Promotes the creation and implementation of gender mainstreaming policies like Gender Equality Plans, Diversity and Inclusion Policies, and Gender Action Plans in partner organisations.
>
> • Provides training for gender awareness strengthening for all partners.
>
> • Attempts to identify and recognise potential preconceptions and biases as it helps us address and overcome them in the project.

In line with the previous two considerations, our RRI guiding principles include two other principles related to gender equity that are mainly focused on gender mainstreaming in all project activities:

1. We aim to reflect on and integrate **gender dimensions in the content of the project activities**, identifying and addressing gender inequalities and needs in the context of the experimental streams.

2. We acknowledge that gender interacts with other categories of identity and adopt an **intersectional approach** to issues of equity and justice.

Adhering to these principles involves a systematic observation of gender issues throughout the whole duration of the project, including the planning of the experiments, participants selection process, data analysis, and outcomes and results communication and dissemination. The following table contains useful questions to reflect on the integration of gender issues in the different project processes.

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7   Seus, S., et al., 2022. *Responsible by choice: an Action Plan for embedding RRI in the SHARED GREEN DEAL project.* Cambridge: SHARED GREEN DEAL.

GUIDING QUESTIONS TO INTEGRATE GENDER	
Planning of social experiments	• Did the experiment team contemplate how the European Green Deal (EGD) topic is potentially gendered? (e.g. it is a topic traditionally understood as a female/ male domain) • Did the experiment team reflect on the potential gender and intersectional impacts of the social experiment? • Did the experiment team consider possible (gendered) barriers to participation in the experiment activities?
Local partners selection	• Did the experiment team share guidelines with local partners to ensure adequate representation and participation of men, women and gender-diverse people in the experiment? • Do the local partners have their own gender policies in place?
Data analysis	• Is gender included as a variable for data collection? Does the data collected allow gender disaggregation? • Is gender included as an analytical and interpretative variable? • Do gender norms, roles, and relations influence participants' experiences and practices? • Is an analysis included to identify the intersection of gender with other socio-demographic categories? • Does the data allow the identification of gender gaps and inequalities? • Is it necessary to re-contact local partners or interviewers in order to solve questions related to gender equality and justice?
Communication	Are communication materials (reports, newsletters, press releases, articles, and multimedia materials) following the principles of gender-sensitive communication? Are the materials being reviewed in order to avoid reproducing gender stereotypes and to ensure the inclusion of all genders while addressing any issue? In project meetings, is the plurality of gender identities respected and normalised? In project meetings, are the moderators aware of the possibility of gender-based participation differences in sharing experiences, decision-making and /- or task distribution? For communication in local languages, are gender particularities of the language considered and addressed (e.g. avoiding the use of the generic masculine in gendered languages such as German or Spanish)? Does your report, workshops, and social media content contain gender-inclusive icons, illustrations and images?
Dissemination of results (academic and non-academic publications)	Are reported results disaggregated by gender and intersecting variables? If gender disaggregation is omitted from the reported results, is there a justification for doing so? Is there gender balance in the authorship of scientific articles among project partners? (Considering indicators such as the number and share of female and male authors) Are reports and publications following the principles of gender-sensitive communication?
Network creation	Did the stakeholder mapping and selection include organisations with a focus on gender? Were gender and intersectional justice considered among the network priorities? Do the selected stakeholders have gender equality instruments in place? Are they willing to implement gender equality statutes?

Gender guidelines for local partners

The social experiments are an integral part of the project aimed at being innovative and participatory. Therefore, gender-just RRI integration in social experiments becomes crucial in their planning and execution. The gender perspective promotes and can ensure to deliver a high quality of experiments and inclusive participation.

There are several important gender considerations that you, as a local partner and as the person responsible for conducting the social experiment, should take into account. To guide you in that process, in this section, we include, first, some ideas to consider in each of the phases of the experiment (Section 3.2.1) and, second, a checklist of questions that will help you assess the extent to which you have integrated gender issues into the conduct of the experiment and the relationship with your stakeholders (Section 3.2.2).

General considerations for gender integration in the social experiments

- **Key groups identification and participants selection**

The first stage of the experiment aims to identify key individuals and organisations and engage them in the activities. Each of the six experimental streams has defined target groups of citizens and professionals for implementing participatory tools (energy communities, local business accelerator hubs, knowledge networks, mobility labs, food assemblies, and study circles). Regardless of the determining characteristic of the group for participation in the experiment (age, disability, people in vulnerable positions), gender and intersectionality should be considered in the mapping of stakeholders and the selection of participants in order to ensure representation of women, gender-diverse people, and men. Therefore, already in the recruitment process, it is important to engage communities who live in, for example, economically disadvantaged neighbourhoods or are members of single-parent groups, and collaborate with local gender-specific organisations.

- **Facilitation of the experiment activities**

Whether creating a knowledge network or organising local assemblies or co-creation events, the experimental streams require the subcontractors to facilitate and moderate group activities. Within all group activities, the well-being of the participants must be given. Therefore, it is helpful to have an overview of people's capacities and address possible challenges of unequal engagement and needs concerning work-life-experiment balance. Considering gender in particular, the development of such activities implies a reflection on how gender roles and gender division of labour, especially care work, might restrict or favour participation in citizen meetings. Thus, it is recommended to avoid planning meetings during primal working hours, make sure that children or older adults are cared for, and that every participant is comfortable with the meeting hours, especially considering the way back home. On the other hand, it involves putting strategies in place to ensure that all voices are heard and addressing the potential imbalances in involvement. To be more concrete, this means considering gendered needs towards the content of the experiments, e.g. sustainable renovation or mobility, as well as towards the form of the integration. It is gender sensitivity that is needed to prepare, implement and evaluate meetings and other group activities. And it is openness to diverging forms of knowledge and knowledge sharing that should be addressed through trying out various methods, such as co-design of group sessions and interviews, eye-opener workshops to enhance gender sensitivity etc.

- **Data collection**

In addition to the participatory methods specific to each experiment, all the streams will collect data through interviews, participant observation, fieldnotes, and surveys. Considering gender in data collection aims to ensure the used methodologies allow for an adequate representation of women, gender-diverse people and men in the sample and capture their different realities and gendered differentiated impacts. Moreover, the selected collection tools should be sensitive to gender in two regards. First, they reflect on the existing gender norms, relations, and identities in a particular context. Second, the language used during data gathering should equally address women, men and gender-diverse people. The following are specific recommendations for each of the methods mentioned above.

Gender considerations for data collection methods	
Surveys	• Collect gender-disaggregated data using tools in compliance with the GDPR and local regulations on data protection. • Include other socio-demographic variables to reflect on the intersection of gender with other categories (socioeconomic status, age, migration status, among others) • Include variables that allow gender inequalities to be identified (e.g. those related to paid and unpaid work) • Make sure that the questions in the questionnaire are relevant to both men, gender-diverse and women. • Formulate questions using gender-sensitive language and be aware of language issues in the local context.
Interviews	• Include women, gender-diverse and men with different situations and experiences concerning the research topic. • Collect data on issues specific to men and women and on perceived differences between them. • Use the interview as a tool to collect data across gender dimensions (norms and relations) and intersecting factors. • Reflect on the potential gender dynamics between the interviewer and interviewee.
Participant observation and fieldnotes	• Collect information on participants' gender so that it can be used for creating sex-disaggregated data for analysis in the later stages of the project. • Consider who has the power or the most significant share in conversations and group activities and who decides and is acknowledged. • Pay attention to reoccurring gender stereotypes, how they impact the situation, and whether they are addressed within the group of participants or not.

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Checklist for gender just and inclusive social experiments

PLANNING OF SOCIAL EXPERIMENTS
• Have you used gender-neutral and responsive language in your call for participants to ensure the diversity of participants? Did you continue to use gender-neutral and responsive communication with possible participants during their recruitment?
• Did you set up a gender quota (a defined share of <u>women/men and gender-diverse</u> participants) for <u>participant</u> recruitment? Have you identified potential barriers to the quota fulfilment?
• Did you approach and collaborate with local organisations, such as local feminist organisations, to directly target and invite women to participate in the experiment activities?
• Do you use an intersectional approach to identify and encourage underrepresented social groups to participate in the social experiments?
• Are you aware of gendered power imbalances in the context of the social experiments and how they might affect participation structures and influence the results?
• Are you considering flexible meeting possibilities with your participants due to their care and labour work duties, restricted mobility, or to meet the needs of specially-abled people?
• Does your organisation have a formal agreement to achieve gender equality and justice?
IMPLEMENTATION OF SOCIAL EXPERIMENTS
• Has the facilitation team been introduced to gender awareness and sensitivity?
• Have you identified potential factors hindering the active participation of women, diverse gender, and men in group activities?
• Do you provide a discrimination-free, safe space for all genders for collective learning and exchange during your social experiments? Do you speak out against discrimination of all kinds?
• Do you provide a refuge for participants who need to breastfeed, need a quiet space to calm down (mental health issues), lie down (menstrual cramps), pray (regarding religious practices taking place several times a day), etc.?
• Do you have a defined procedure followed by the department or a team dealing with internal cases of assault, sexual harassment, and intersectional discrimination? Did you appoint an awareness person within your team?
• Is the activity location accessible for everyone? Are your meeting locations accessible via public transport and for specially-abled people?
• Are you ensuring the well-being of all of your participants and co-workers?
• Have you discussed your (regular) meeting hours within the group of participants before deciding on them so that everyone can participate in the sessions?
• Are your workshops, living labs, eco-home tours etc., planned in an inclusive way?
• Do you include diverse knowledge forms in the social experiments?
• Do you provide a gender-responsive workshop moderation that challenges gender stereotypes? Do you avoid hierarchal structures in the discussions? Do you thoughtfully consider the diverging perspectives on the given topic, including gendered needs towards, e.g. renovation or mobility?
• Do you ensure that participants can have different ways to express their opinions in case they feel uncomfortable speaking in large groups?
• Are gendered needs and perspectives reflected in the group's non-verbal communication?
• Are you ensuring diversity in external experts concerning age, gender, educational background etc.?
• Do the visual materials shown or shared convey gender diversity, inclusivity, and balance?

Reflection upon Social Experiments (also during the implementation phase)
• Did the experiments, interviews, and discussions go as you imagined? What were the differences, and did you get to discuss the procedures with your participants?
• Did you evaluate the data gained from your activities through a gender lens?
• Were you attentive to the discussed gender inequalities, stereotypes, biases etc., during your notetaking?
• Did you collect gender-disaggregated feedback from the participants?
• Are the results and information gathered throughout the social experiments accessible to the public?
• Are the results understandable and relatable for the given audience, e.g. children or lesser educated or lesser literate people? Are they written in a gender-neutral or sensitive manner?

Further reading

Gender dimension in RRI

European Commission, 2011. *Structural Change in Research Institutions: Enhancing Excellence, Gender Equality, and Efficiency in Research and Innovation.* Luxembourg: Office for Official Publications of the European Communities.

Fältholm, Y., Wennberg, P., Nilsson, Å.W., 2016. Promoting Sustainable Change: A Toolkit For Integrating Gender Equality and Diversity. Bradford: GENOVATE.

Viola, P., et al., 2018. *Monitoring the evolution and benefits of responsible research and innovation: Summarising insights from the MoRRI project.* Brussels: European Commission.

Integration of gender in research and innovation projects

European Commission, 2011. *Toolkit Gender in EU-funded research.* Luxembourg: Publications Office of the European Union.

European Commission, 2020. *Gendered Innovations 2: How Inclusive Analysis Contributes to Research and Innovation,* Luxembourg: Publications Office of the European Union.

Korsvig, T., Rustad, L.M., 2018. *What is the Gender Dimension in Research? Case studies in interdisciplinary research.* Lisaker: Kilden.

Søraa, R.A., et al., 2020. Diversifying diversity: Inclusive engagement, intersectionality, and gender identity in a European Social Sciences and Humanities Energy research project. *Energy Research & Social Science,* 62(101380).

Gender and the European Green Deal

European Environmental Bureau (EEB) and Women Engage for a Common Future (WECF), 2021. *Why the European Green Deal needs ecofeminism. Moving from gender-blind to gender-transformative environmental policies.* Brussels: EEB

Heffernan, R., et al., 2021. *A Feminist European Green Deal: Towards an Ecological and Gender Just Transition.* Bonn: Friedrich-Ebert-Stiftung.

Gender mainstreaming and gender-sensitive communication

European Institute for Gender Equality (EIGE), 2016. *What is Gender Mainstreaming?*, Luxembourg: Publications Office of the European Union.

European Institute for Gender Equality (EIGE), 2019. *Toolkit on Gender Sensitive Communication*, Luxembourg: Publications Office of the European Union.