



# HOW TO EMBED GENDER EQUITY APPROACH IN A EUROPEAN PROJECT ON FORCED MIGRATION

## The experience and challenges of a H2020 initiative

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### KEYWORDS

*Gender equity  
Forced migration  
Forcibly displaced persons  
European project  
Attention and inclusion  
Gender sensitive  
Gender transformative*

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### ABSTRACT

*The current paper plunges into the reality of a European Research and Innovation project on forced migration, with the aim of explaining the challenge of embedding gender equity approach into the entire process. The level of gender sensitivity of the initiative is analysed, as well as the difficulties and benefits in the implementation of gender equity in a culturally diverse and complex research surrounding of a three year H2020 initiative focused on finding tailored attention and inclusion strategies for forced migrants. Findings show the need for additional training at international level, and the quest for genuinely transformative gender equity strategies.*

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### PALABRAS CLAVE

*Equidad de género  
Migración forzada  
Personas desplazadas por la fuerza  
Proyecto europeo  
Atención e inclusión  
Sensible al género  
Transformativo de género*

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### RESUMEN

*El presente documento se sumerge en la realidad de un proyecto europeo de investigación e innovación sobre migración forzada, con el objetivo de explicar el desafío de incorporar el enfoque de equidad de género en el proceso. Se analiza el nivel de sensibilidad de género, así como las dificultades y beneficios de implantación de equidad en un contexto culturalmente diverso y complejo de un H2020 de tres años, enfocado en encontrar estrategias de atención e inclusión personalizadas para personas deslazadas. Se evidencia la necesidad de capacitación adicional a nivel internacional y la búsqueda de estrategias de equidad genuinamente transformadoras.*

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## 1. Introduction

Gender has become one of the key aspects in the European research and innovation arena, where gender sensitive and balanced approaches are a sine qua non condition when applying for funds. At policy level, the objectives are clear, but still, we are far from reaching truly effective and change-making gender equity research practices, let alone reaching a balance in the global society. According to World Economic Forums 2020 report, today's active generation will not see gender equity in our lifetimes as it will be yet not reached for another 99,5 years. Gender equity in research is much more than gender balanced teams and adding gender as an explaining variable. The complexity of embedding gender –not including or adding- in an international research setting can be best understood if we consider gender equality from a broader perspective, including economic participation and opportunity, health and survival, political empowerment and educational attainment in each of the countries that participate in a project (WEF, 2020) and remember the cultural and religious norms that guide the understanding of the term gender around the world. These are the base elements that underlie any approximation to the concept and practice of gender and explain why it can be highly challenging to embed gender to international research, with a diverse starting point in each country.

When doing participatory social research in real life contexts in a truly global setting which includes both European and non-European countries, putting gender equality in practice can face huge difficulties in terms of discrimination, contrary attitudes and long lived social norms, especially when it comes to research habits and power structures. The current paper analyses the first-hand experience of managing gender balance and equity in an international consortium of a Horizon 2020 project, focused on refugees and displaced people in Europe and Middle East. Special requirements apply when researching persons in forced displacement, many of the related to gender. Considering that gender is an intersectional element that often correlates with other vulnerabilities, doing research with and for forced migrants requires reflexion, anticipation and personalized research practices.

This paper delves into the reality of an ongoing European project, with the aim of exploring how diverse aspects of gender were transversally embedded into the research process in seven participating countries, including partners from Spain, Italy, Hungary, Finland, Turkey, Jordan and Lebanon. Gender balance in research teams, work division and decision making have become a must in research and innovation projects financed by the European Union projects, and integrating gender in the design and analysis of the results is practically compulsory in Social Research, but still, moving from plans to actual practices of gender equity in all the research stages proved to be highly challenging.

## 2. Objectives and methodology

The objective of the current paper is to show how gender equity aspects were integrated not only into the project team, research design and practice, but also in the resulting innovation activities. The specific objective was to explore if it would be possible to move on from merely gender-aware and -sensitive practices to more gender-responsive and even gender-transformative actions. Also, one of the quests of the project was to come up with practical advice and guidelines for reaching higher levels of integrating gender in a R&I process, thus approaching gender embedded practices.

This study offers a critical vision of a project, from the point of view of the project coordinators and partners, and therefore, the team opted to use the methods of case study and participatory observation. It shows in a practical way the challenges of embedding gender, from the research concept and structures to practice, that took place in a highly culturally diverse and demanding research setting, with highly vulnerable persons as a subject of study. The project kick-off was subject to a series of initial gender requirements, already included in the project's Grant Agreement and specific guidance has been offered in several project deliverables. The paper offers an inside vision of how the process was guided and how gender equity measures were implemented in R&I, as well as the difficulties and benefits of becoming more gender-responsive.

## 3. Delving into the project: analysis and results

### 2.1. Core aspects of the project

During the past 3 years, project partners together with their Action Research Units, formed by highly engaged stakeholders, committed to designing, implementing and establishing evaluation mechanisms for 8 Tailored Attention and Inclusion Strategies, after an exhaustive initial fieldwork where the researchers explored forced migrants' opinions via interviews and gathered examples of good practices in migrant integration from all over the world (Lebanese International University, 2021). The project has been extensively explained in several project deliverables, available at the project website ([http:// https://raisd-h2020.eu/](http://https://raisd-h2020.eu/)). The project main objective was to gain evidence for a series of innovative attention and strategies that would be tailored to the needs and contexts of vulnerability of the forced migrants, then put in practice and tested, so they could provide model actions for other organizations and initiatives that work in the same field. The collaborative research focus, inherent to

the Responsible Research and Innovation (RRI) philosophy, that frames the project (Owen *et al.*, 2013) brought together researchers, civil society organisations, forcibly displaced people, policy makers and a small number of persons from the business world who established the before mentioned ARUS, units that were responsible for the co-creation of pilot strategies in Spain, Italy, Finland, Hungary, Turkey, Jordan and Lebanon. Each strategy took place within the local contexts of the participating countries, each of which has a different national context, opinion climate and regulations in terms of welcoming and integrating FDP.

The expression “tailored” visually explains how these pilot experiences became different from the usual integration strategies used by organisations and institutions that assist FDP, that tend to be generalized and fragmented (Hänninen *et al.*, 2022). The first step was, as it happens when confectioning a suit, taking the measures and analysing suitable fabrics. In the project, this translated to detecting needs and requirements of forced migrants and exploring their vulnerabilities through interviews. Afterwards, a tailor shows catalogues of different models of suits to the client. Examples of interesting good practices were recollected and analysed to get ideas and for the new programs. The, following the simili of tailoring suits, the tailor makes a pattern adjusted to the measures of the client, cuts the fabric, sews and tries it on. In this project, the collaborative units designed the strategies and tailored them to the needs of forced migrants, tested and assessed them, and finally suggested these agents working in forced displacement.

As it is known, the suit requires several rounds of trials where it is adjusted to the figure and desires of the client. In the current project, the design and execution was made in 3 successive rounds, with evaluations and adjustments between the phases. This way, the results were tailored strategies, instead of general programs, which are able to offer better responses to the specific needs of the target groups, above all forced migrants, but also social workers and organisations that benefited from the programs.

Finally, if the suit becomes a success, the pattern model will be part of the catalogue of the tailor and it is offered to other clients with similar characteristics. These tested strategies are offered for the use of similar projects and initiatives, and therefore, they are included in the project dissemination and outreach plan, of which the current article forms part. More information on the strategies can be found at the project website (<https://raisd-h2020.eu/>).

## **2.2. Initial gender regulations for the project, team structures and R & I strategy**

Several international publications on research of refugees and other vulnerable collectives and gender equity were studied and resumed for the production of the project own gender equity policy and guides, among others the Guidance note -Research on refugees, asylum seekers and migrants (EU, 2020), Toolkit gender in EU-funded research (EC, 2011) and Gender equity (RRI-tools, 2016). Also, the European Code of Conduct for Research Integrity (ALLEA, 2017) includes respect as one of the core research principles. Indirectly, gender is inherent when the principle states the need of “respect for colleagues, research participants, society, ecosystems, cultural heritage and environment” (p. 4).

It became evident quite soon that embedding gender to this research and innovation projects’ structures, power relationships, methods, execution and evaluation was not an easy task. Nor was the follow-up and supervision of gender equity throughout the entire process. Monitoring faraway partners’ gender equity policies and practices in the daily research and innovation work is challenging and based on the self-reporting of all consortium members. As part of the project’s quality assurance plan, gender equity was constantly included in the consortium meetings’ agenda and specific guidance was offered in the international workshops. Also, advice was given individually to all the consortium members when needed.

As it became patent that more instruction at this respect was necessary, the project coordinator and methodology team offered an additional guide on gender (Guilló *et al.*, 2020) and how to interview vulnerable publics (Guilló *et al.*, 2020). The current project recollect provides important insights and practical advice about these issues in several internal and public documents (more information in D3.2.2 Manual researcher: Ethics and Gender and other documents at <https://raisd-h2020.eu/>).

## **2.2. Gender in the research practice: initial fieldwork**

Following the guidelines offered in the diverse project guidebooks and handouts described in the previous chapter, gender balance was achieved in the international fieldwork teams, compounded by at least 50 % of female researchers and fieldwork assistants. As a norm, in most cases, female interviewees were used to interview female participants, especially when it came to interviewees that had suffered violence or had been subjects to patriarchal practices, or confessed religions with restrictive interpretation for the interaction between men and women.

Also, the interviews were done in safe surroundings, without the controlling member of the participants’ family or social group members, so their genuine ideas, fears and need could be detected. All the interviewees gave their informed consent to the research agents, who committed to the most strict privacy and personal data protection instructions, and also, all the research data was correctly anonymised, to avoid any possible identification which

could cause harm or risk to the participants. During the interviews, if the participant started to feel stressed or did not want to continue, the action was immediately stopped and no one was forced to continue.

During the first year of the project, 178 in-depth interviews to forcibly displaced people were carried out, including 25 interviewees in each of the participating countries: Spain, Italy, Turkey, Hungary, Lebanon and Jordan, with the exception of Finland, that included 28 interviews. In the initial meetings of the social actors participating in the research, mostly NGOs and local administrations together with the researchers, basic questions for the project were exposed, especially in terms of exploring the most vulnerable collectives among forced migrants. Gender was found to be one of the intersectional factors that often augments the migrants' vulnerability. Therefore, the research teams in the participating countries decided to include more women than men in the samples, 60 % of the interviewees being female (107).

When it comes to vulnerability factors discovered in the fieldwork, these vary depending on the local context and type of migrants interviewed, but there are some common features. Among others, these include trauma as a result of the often long and troublesome migration journey, during which many have suffered psychological, physical and sexual violence. Some of them have witnessed torture and even murders, or in the extreme cases, were subjects of forced labour and slavery practices. The majority have migrated by irregular means, victims of human trafficking, human smuggling and dangerous death threading journeys by sea or land. Libyan camp and detention centre survivors shared terrifying stories of human rights violations and extreme violence.

Another factor that augments the vulnerability of many forcibly displaced persons is the lack of access to education, the school drop-out due to war and poverty are frequent among them, especially women. The fate of the ones with further education is usually better and they feel better integrated. Also, many have large families to support either with them or back in the home country. Many families have been torn apart in the exile process, some have lost family members who have been killed or kidnapped in the conflict areas. PTSD (post-traumatic stress disorder) and other psychological disorders are therefore frequent among them, though many do not mention these aspects directly. Also, several migrants suffer from chronicle and other diseases, some are the result of the hardness and lack of proper food and sanitation conditions during the journey.

Most of the interviewees are asylum seekers and subsist with very scarce income, unemployment among them is extended and so is the adaptation to the transit or hosting countries society. Many migrants found life better in their home countries and feel nostalgic, though there are cases of extreme suffering and trauma experienced back in the old country which makes them want to forget everything about their origin, making them feel more at safe in the new country. A rather small number of the persons interviewed have started to feel integrated in the new country and are grateful for the assistance they receive from the authorities and NGOs. The vast majority have complaints about the asylum process and many offer ideas for its improvement. Not all have access to assistance programs, though many are included in the compulsory integration paths.

Most of the above mentioned vulnerability factors tend to intersect with gender, female migrants having higher risks of becoming abused and suffering violence, often being the family integrators and responsible for childcare, frequently lacking work and study opportunities outside the family and refugee centres. These findings were important drivers when the national teams decided which would be the main beneficiary group of the attention and inclusion program, which would need more assistance.

### **2.3. Embedding gender in the innovation actions: attention and inclusion strategies for forcibly displaced persons**

Gender approach is at the very core of the innovation design, strategy and actions of the project, consisting in the before mentioned tailored attention and inclusion strategies of forcibly displaced persons. As mentioned before, the initial interview results found women to be in an extremely vulnerable situation more often than men, though male migrants had also suffered violence and persecution in the countries of origin and transit. The fate of transsexual persons and other gender diverse groups is severe, the respect for the most basic human rights lacking when the person decides to flee, to save her/his life and liberate from persecution.

The difficulties faced by displaced people do not end in the host countries, and they need to struggle with new challenges in the exile, due to negative and racist attitudes in the local society, long and complex regularization process, feelings of loneliness and social exclusion, among other motives. Though the cases of women living in vulnerable contexts were accentuated, there were many cases in which the male interviewees were found to suffer social exclusion and other difficulties in the host countries. For example, Arab origin forced migrant men in Northern countries often live situations of social exclusion. Therefore, one of the inclusion programs in Finland, the online discussion forum, was focused on migrant men and their social integration.

More than half of the beneficiaries selected to be the attention strategy beneficiaries are forced migrant women that have suffered both physical and psychological gender-based violence. As seen before, being a woman or a girl is often a determinant factor that augments the vulnerability of a forced migrant. This becomes particularly evident in dangerous and violent home and transit country conditions, but it also appears in receiving countries where the conditions often are not the expected. Many forcibly displaced persons drag from their journey several

post trauma symptoms, complicated family conditions, loneliness, isolation, economic difficulties, local culture and language knowledge gaps, summing patriarchal family traditions and unwanted pregnancy when talking about women.

The University of Edinburgh’s hub for gender and sexuality “Applying GSSA to your Project” (GenderED, 2022) offers a simplified tool for gender-sensitive situational analysis, which has provided interesting tips for improving the gender equity approach in the project and foster discussion on the issue. According to GenderED, the initial setting requires equal access to decision making, to resources and their control and an egalitarian division of labour and human resources, as well as a gender-sensitive analysis of the starting point, the initial situation. Gender differences and equity are considered at diverse research stages, from the conceptualisation of the project, data collection and fieldwork, to building a balanced team and incorporating gender focus to impact assessment and dissemination as well as outcomes monitoring. Detailed information about the steps to gender equity is available at <https://www.gender.ed.ac.uk/gender-sensitive-research/gssa-fivesteps/>.

**Table 1.** Oxford Rubric for Integrating Gender in Research Planning

LEVEL OF GENDER AWARENESS	HOW GENDER IS PERCEIVED AND INTEGRATED IN THE RESEARCH
Gender-blind	Gender is not considered in the research project, not in the conceptualization or the rationale, nor differentiating and detecting intersectional experiences of women, men and gender diverse groups.
Gender-aware	Though gender is considered in the research project’s rationale, still it is not an operative concept in the project design and methodology.
Gender-sensitive	Gender is present not only in the project rationale, but also in the design and methodology. Gender is considered in terms of disaggregating data, composing the research team and groups of analysts. Still, this kind of research does not extend to the analysis and action to address properly gender inequalities.
Gender-responsive	The project rationale, design and methodology include gender considerations and gender is strictly analysed and embedded in the implementation, communication and influencing strategies. Still, at this level, the underlying structural aspects such as norms that contribute to gender inequalities are not properly addressed.
Gender-transformative	This level examines, analyses and builds an evidence base for informing long-term changes in structural power relation, norms, roles and inequalities that hinder reaching equity. Gender-transformative research is capable of leading to sustainable changes through its activities, such as partnerships, outreach and interventions, especially with organizations that work in women’s rights.

Source: Jayasinghe, Pavez Butt & Zaaroura, 2019 (adaptation by the author)

If we place the projects’ main innovation product, the tailored attention and inclusion strategies in the Oxfam Rubric for Gender Integration (Jayasinghe, Pavez Butt & Zaaroura, 2019), most of them can be considered not only gender-sensitive, but also gender-responsive. Gender is considered in the project’s rationale and design, and the methodology is rigorously analysed with a gender view to inform implementation, communication and influencing strategies. To reach the upper level of becoming gender-transformative, the research and innovation need to address the underlying structural factors, such as norms and power relations that contribute to gender inequalities. This latter level has been reached to some extent in the project research, e.g. in the definition of the vulnerability context, and also, in the innovative co-expert working system, that empowered female participants giving them an active role in the decision making, allowing them to participate and decide about the design and redefinition of programs that they were attending to, instead of offering them top-down closed inclusion strategies. For example, the beneficiaries took part in the co-design, evaluation and suggested improvements in the integration program that was implemented in Spain, called Refuge of Power. It consisted of an entrepreneurship and employability program for forcibly displaced women from Sub-Saharan regions.

Gender is considered at all phases of the project, beginning with a gender-sensitive research and innovation design and gender equity in the workgroups. It impregnates the whole process from the fieldwork to the design, execution and evaluation of the programs. Gender is also used in the project conceptualization, as it is determinant in the understanding and definition of the concept of VC and in the language used by the project participants. Even if the project cannot be considered a fully gender-transformative project, at conceptual level and in terms of most of the national programs, it does have the objective of empowering forced displaced women and fostering gender equity, inclusion and diversity. It has the ingredients for reaching a potential benchmark effect, as it offers a pathway to gender equal and inclusive work environments and gender transformative integration practices.

### 3. Conclusion and recommendations

In order to design a gender-sensitive research project, gender aspects should be transversally integrated in the research design and structures and monitored throughout the project. The experience acquired with the current research and innovation process has been an interesting lesson to learn for the entire international project team, mistakes have been made and corrected, and surely, intense reflexions have taken place in all the participating countries regarding gender equity, the intersectionality of the concept and the challenges of moving from policy to grassroots practices. Our conclusion is that many tasks remain pending in our way form gender sensitive practices to gender-transformative action, to become change-makers.

We are positive about the project results and the steps we have taken in the road towards the concept of fully embedded gender equity. For this reason the team would like to share some practical step to step tips when considering gender in research. Also, it is key to remember that for the current European funding embedding gender in the entire research has become a must, and surely, it and surely, it will be increasingly so in future calls for grants,

The main steps to be considered include the following:

1. Be equalitarian and build inclusive research and implementation teams, with equal gender balance, ensuring you include 50 % of women. See if you can include gender experts in the team, whatever the subject is. Including experts makes equity planning and practice easier.
2. Consider including a wider gender and inclusion perspective, integrating Lesbian, Gay, Transgender, Bisexual, Intersex and Queer + or Questioning (LGTBIQ+) aspects when feasible. Consider including non-binary persons in the team and in the design.
3. If you work in issues related to disabilities, include disabled people in the research and innovations teams, and consider the intersectionality between gender and disability.
4. Give both/all genders a say and include an equal number of men and women in management and decision-making positions, including access and control to resources. Make sure the inclusion is reflected in action, not only in policy and strategy.
5. If the project already has named a male dominated management team, mend the situation and try democratic decision making, including female and diverse team member in the process.
6. Make a gender-sensitive research design: from situation analysis to data collection, fieldwork and data analysis. Reflect about gender as a factor, underlying variable or explaining element.
7. Use and train gender-, culture- and diversity sensitive field research teams. Consider using female or gender diverse interviewers for female or gender diverse interviewees when necessary.
8. Explore gender differences when reporting results, see if these are descriptive or explanatory.
9. Search for intersectionalities and conceptualise gender in your work. For example, see how it correlates with certain vulnerability aspects, if relevant for your team.
10. Acknowledge gender aspects and equal participation in project dissemination, outreach and exploitation activities.
11. Monitor gender-related aspects all along the project process and correct deviations.
12. Aim to offer far reaching results in terms of gender equity. If possible, move from gender-sensitive to gender-transformative action.
13. Give gender-transformative policy recommendations when feasible.
14. Share your experience and spread good practices.
15. Learn from mistakes and keep in touch in groups that work in gender equity.
16. See equity, diversity and inclusion as a plus for the project productivity.
17. Become cross-disciplinary and gender transformative and see how it affects the dynamics and results.

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