TOWARDS GENDER EQUALITY, DIVERSITY AND INCLUSION

A METHODOLOGICAL GUIDE

editors

EWA JAROSZ
JOLANTA KLIMCZAK
MARTA MARGIEL

REVIEW:
Iside Gjergji – eCampus University
Natalija Mažeikienė - Vytautas Magnus University

AUTHORS:
Marina Appiou Nikiforou - European University Cyprus
Małgorzata Chrupała-Pniak - University of Silesia in Katowice
JosAnn Cutajar - University of Malta
Andri Christoforou - European University Cyprus
Luna Carpinelli - EUNIversity
Edit Kriston - University of Miskolc
Ewa Jarosz - University of Silesia in Katowice
Jolanta Klimczak - University of Silesia in Katowice
Marta Margiel - University of Silesia in Katowice
Gábor Mélypataki - University of Miskolc
Janet Mifsud - University of Malta
Marco Navarra - EUNIversity
Bernadett Solymosi Szekeres - University of Miskolc
Katarzyna Więcek-Jakubek - University of Silesia in Katowice
Roderick Vassallo - University of Malta

INDEX

INTRODUCTION

THE GEPARD PROJECT – CONTEXT AND BACKGROUND

Gender Equality Programme in Academia: Raising Diversity (GEPARD) is a project whose main objective is to counteract gender-based exclusion, intended primarily to help develop policies of equal opportunities as well as to increase diversity in an organization. Its particular aim was to develop tools and measures to help build and improve gender equality programmes in academia as well as other environments. The exchange and promotion of good practices in academia and the general promotion of inclusion and diversity in the higher education sector were additional intentions of the project. We pursued these objectives in the GEPARD project by developing a set of activities used to create a universally applicable model of a gender equality plan (UGEP) with suitable tools (methodological guide and e-toolkit) and supportive means (educational scenarios). The objectives have been achieved mainly by the analysis of good practices in the field of gender equality of different universities and also by the analysis of research used in various gender studies.

The project was realised by an international consortium consisting of higher education institutions from several European countries: Poland (University of Silesia in Katowice), Austria (Paris Lodron Universitat Salzburg), Hungary (Miskolci Egyetem), Cyprus (European University Cyprus) and Malta (L-Università ta' Malta) and an Italian enterprise closely connected with the academic environment (EUNIVERSITY). The Consortium activities and achievements were also supported by international academic institutions as associated partners.

Project GEPARD (2021-1-PL01-KA220-HED-000027532) was funded by the European Commission under Erasmus + Programme Strategic partnerships

in higher education sector. The project was implemented between January 2022 and March 2024.

One of the goals of the GEPARD project, in supporting universities or other organisations in developing a gender equality plan, was the preparation of a practical handbook for diagnostic, monitoring and evaluation activities which could be applied in the academic space, or other context. In practice, this entailed the production of a methodological guide. The guide is a compilation of methodological solutions and recommendations for all organisations, entities and people engaged in equality and diversity policies or plans and in monitoring the progress of its implementation.

WHY IS THERE A NEED FOR A HANDBOOK ON HOW TO RESEARCH EQUALITY AND DIVERSITY?

In today's world, respecting diversity and ensuring equality, with respect to gender, is both a moral imperative and a fundamental challenge. Eliminating gender inequality in all spheres of life is becoming a goal for many communities and for a growing number of organisations, institutions and individuals. Achieving this goal, however, requires not only goodwill but also the knowledge and research competence to create functional equality and diversity plans and to analyse them.

There is no doubt that any action aimed at the realisation of the idea of equality and diversity should be based on a sound recognition of the state of the environment of an institution or organisation, in terms of equal opportunities and the need for directions and the nature of actions that can improve the wellbeing of individuals and groups, their chances for development, as well as their security in a given environment. The development of equality policies, the construction of plans or specific gender equality programmes, and their improvement require reliable research activities to accurately determine the state of affairs and needs, in order to identify the progress required to improve the situation or to implement measures, or to evaluate the effectiveness of adopted plans and programmes. In other words, research activities, whether aimed at diagnosing the state of affairs or monitoring needs, or activities, or evaluating adopted plans, must be based on methodological principles that secure valuable results that are obtained, if they are to be accurate and serve their purpose. Research forms the basis for

decisions and actions. Therefore, knowledge of research procedures and how to conduct practical research to collect data subjected to analysis is essential for developing and improving equality and diversity policies.

The handbook intends to present, in an accessible way, basic information on practical gender-oriented research and how this can be implemented and applied in different settings and realities. The handbook can be used both in academic settings as well as in other workplaces by those responsible for and involved in equality policy in some other setting or institution. Thus, the handbook can be of practical assistance to local actors and the various institutions, units or agencies within them, to public and private sector bodies, schools and other educational establishments, cultural institutions, business entities, companies or organisations that are developing or just starting to create equality plans or are preparing to do so. The handbook provides information and guidance for research practice to build or improve gender equality plans. It presents various research methods and their analysis that can be used to effectively design, implement and evaluate gender equality and diversity development activities.

THE CONTENT

The handbook comprises nine chapters written by authors with different educational and scientific backgrounds from the 6 project countries.

Chapter 1 focuses on the fundamental aspects of the European Gender Equality Policy. It begins by exploring the legal framework within the European Union related to gender equality. This section provides an overview of the legal foundation for gender equality initiatives within the European Union. The chapter also delves into the social justification for gender equality policies. It examines the reasons and motivations behind the need for such policies, highlighting the societal context in which gender equality measures are implemented. Furthermore, the chapter introduces and defines key concepts, terms, and ideas in the field of Gender Equality Policy. It helps establish a common understanding by presenting and explaining essential terminology and concepts that will be used.

Chapter 2 delves into the critical components of gender-sensitive assessments, offering valuable insights into how to effectively diagnose, evaluate,

and monitor the impact of these policies. In Chapter 3, we provide an array of methods and theories for conducting in-depth analyses of GEPs; from case studies to feminist institutionalist theory, to focus group interviews, to sex-disaggregated data analysis. This part equips you with a rich toolbox of approaches to scrutinise, comprehend, and improve the landscape of gender equality policies. Whether you are a researcher, policymaker, NGO activist or advocate, this handbook will be your guide to making informed decisions and driving positive change in the realm of gender equality.

Chapter 4 opens with an introduction to the complex interplay between work-life balance and organisational culture. This section provides the foundational understanding necessary to delve into the nuances of these dynamics. Our handbook also offers valuable guidance to those seeking to investigate work-life balance and organisational culture. It presents a range of research methods, supported by practical examples, to facilitate a nuanced examination of the impact of policies and practices in this domain.

The two ensuing chapters, Chapter 5 and Chapter 6, deal with very crucial issues related to gender balance in decision-making and leadership, as well as ensuring equality in the recruitment and selection process in academia. Chapter 7 delves into the critical task of "Integrating the Gender Dimension into Research and Teaching." This chapter highlights the increasing importance of not only incorporating gender considerations in research, but also mainstreaming them in teaching and knowledge-transfer activities.

Then, in Chapter 8, we address the critical issue of gender-based violence, including sexual harassment in academic institutions. This chapter explores why tackling gender-based violence is a pivotal component of a comprehensive Gender Equality Plan, emphasising the urgency and importance of addressing this issue. It sheds light on the complexities and unique challenges within academic environments that necessitate specific measures, as well as offering a range of suggested research methods and investigative approaches tailored to the study of gender-based violence in academia.

Lastly, Chapter 9 explores the crucial role of diversity in both academia and the workplace, emphasising the need for mainstreaming diversity. It examines diversity's significance within academic institutions and its benefits and challenges and highlights how diversity enriches organisations and promotes innovation and inclusion at work.

Users of the handbook can use the information, guidance and recommendations presented in a comprehensive or piecemeal manner, depending on their needs.

Ewa Jarosz
Jolanta Klimczak
Marta Margiel

CHAPTER 1

MAIN ASSUMPTIONS
OF THE EUROPEAN GENDER EQUALITY POLICY

1.1 LEGAL BACKGROUND OF GENDER EQUALITY – *Edit Kriston*

The European Union has always set itself the goal of promoting equal opportunities. The implementation of the different measures has not been completed yet, though many steps have been taken in recent years that have contributed to the reduction of differences between genders. The measures and the legal framework established try to regulate the issue in a general context.

The European Union endeavours to ensure gender equality by:
1) creating the appropriate regulatory framework by developing the relevant legal standards.
2) integrating the gender dimension into all its policies and makes it a universal requirement.
3) introducing a number of targeted measures to improve the situation of women.

In terms of the legal context, the EU first established the principle of "equal pay for equal work" in 1957, which can still be found in Article 157 of the Treaty on the Functioning of the European Union (TFEU) as the cornerstone of equal opportunities for men and women. Each Member State is required to ensure that this principle is implemented. It is also provided that the European Parliament and the Council, acting in accordance with the ordinary legislative procedure and after consulting with the Economic and Social Committee, shall adopt measures to ensure the application of the principle of equal opportunities and equal treatment of men and women in matters of employment, including the principle of equal pay for equal work. As regards the implementation of measures, we find in this section that, in order to ensure full equality between men and women in the working life, the principle of equal treatment does not prevent Member States from maintaining or adopting measures providing for certain advantages in order to make it

easier for the under-represented sex to pursue professional activities, or to prevent or compensate for disadvantages in their career development. These requirements later appeared in Article 21 of the Charter of Fundamental Rights of the European Union. Article 8 of TFEU also gives the EU the task of eliminating inequalities and promoting equality between women and men in all its activities.

It can, therefore, be seen that the world of work was the first to develop the issue of gender equality, but over the years, the European Union has adopted many other legal acts to ensure equality not only in employment relations, but also, as far as possible, in all areas of life.

Among the main relevant legal documents, first mention should be made of Directive 79/7/EEC[1], which was the first to aim at eliminating the differences between men and women in the field of social security. In particular, it protects against the risk of sickness, disability, old age, accidents at work, occupational diseases and unemployment, and the rules and social assistance intended to supplement or replace these schemes. The document provides equal treatment in the following areas, without respect to marital or family status:
– the scope of the schemes and the conditions for access to them,
– as regards the obligation to contribute and the calculation of contributions,
– the calculation of benefits, including allowances for spouses and dependants, and the conditions governing the duration and retention of entitlement to benefits.

The next milestone in legislation was Directive 92/85/EEC[2] on the introduction of measures to encourage improvements in the safety and health at work of pregnant workers and workers who have recently given birth. In this case, the legislation approaches a much more specialized group of persons in a unique situation, where differentiation is necessary in order to give them equal opportunities compared to ordinary workers.

---

[1] COUNCIL DIRECTIVE of 19 December 1978 on the progressive implementation of the principle of equal treatment for men and women in matters of social security (79/7/EEC) https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=celex%3A31979L0007.

[2] Council Directive 92/85/EEC of 19 October 1992 on the introduction of measures to encourage improvements in the safety and health at work of pregnant workers and workers who have recently given birth or are breastfeeding (tenth individual Directive within the meaning of Article 16 (1) of Directive 89/391/EEC) https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A31992L0085

The expansion of equal opportunities issues started in the early 2000s, when the European Union tried to find a general solution to prevent women leaving the world of work. It was the first time that Council Directive 2000/43/EC[3] implementing the principle of equal treatment irrespective of racial or ethnic origin was published, prohibiting discrimination on grounds of racial or ethnic origin in a number of areas. The preamble of the document includes that, in order to ensure the development of democratic and tolerant societies in which all people can participate, irrespective of racial or ethnic origin, action in the field of discrimination based on racial or ethnic origin should go beyond access to self-employed and non-self-employed employment and cover areas such as education, social protection, including social security and healthcare, social advantages, access to and supply of goods and services.

In this context, Council Directive 2004/113/EC[4] was published in 2004, about provisions ensuring equality in access to and supply of goods and services. The aim of this directive has also demonstrated the desire to go beyond employment and social policy areas to achieve wider recognition of gender issues.

Since 2006, the European Union has reviewed a number of issues with regard to the existing set of rules and new directives have been published which sought to regulate the possible perspectives of gender equality even more widely and in line with changing societal needs.[5] From 2010 onwards, in line with the European Union's equality strategy, the scope of the areas

---

[3] Council Directive 2000/43/EC of 29 June 2000 implementing the principle of equal treatment between persons irrespective of racial or ethnic origin.

[4] COUNCIL DIRECTIVE 2004/113/EC of 13 December 2004 implementing the principle of equal treatment between men and women in the access to and supply of goods and services https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32004L0113.

[5] The important modifications: DIRECTIVE 2006/54/EC OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 5 July 2006 on the implementation of the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation (recast) https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32010L0018
Directive 2010/41/EU of the European Parliament and of the Council of 7 July 2010 on the application of the principle of equal treatment between men and women engaged in an activity in a self-employed capacity and repealing Council Directive 86/613/EEC
https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32010L0041.

concerned was extended and Directive 2011/36/UE[6] of the European Parliament and of the Council was published, opening a dimension in the fight against trafficking in human beings. This directive recognises the gender-specific nature of trafficking in human beings and the fact that men and women are trafficked for different purposes, thus raising awareness of the need for gender differences to be taken into account in assistance and support measures, where appropriate.

Finally, among the steps taken to broaden the areas of rules, the European Union has also taken steps to recognise equal opportunities in citizens' private lives, resulting in the adoption of a directive on work-life balance measures for parents and carers[7]. This document explicitly states that work-life balance policies should contribute to achieving gender equality by promoting women's participation in the labour market, the equal sharing of care responsibilities between men and women and the elimination of gender gaps in income and pay. The main problem in this area is the under-representation of women in the labour market, where it is difficult to balance work and family responsibilities. In many cases, after having children, women are likely to work fewer hours in paid employment and spend more time fulfilling unpaid care responsibilities.

Work-life balance, therefore, remains a major challenge for many parents and workers with caring responsibilities, in particular, due to longer working hours and changing working time patterns, which adversely affect women's employment.

Thus, the former aspects tried to illustrate the main areas and issues where the European Union has already tried to build the possibility of equal opportunities, but it can also be seen from the described and listed legal texts that all have been implemented in the form of directives. As a result, it was necessary to implement them in the Member States, which in many cases was

---

[6] Directive 2011/36/EU of the European Parliament and of the Council of 5 April 2011 on preventing and combating trafficking in human beings and protecting its victims, and replacing Council Framework Decision 2002/629/JHA
https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32011L0036.

[7] Directive (EU) 2019/1158 of the European Parliament and of the Council of 20 June 2019 on work-life balance for parents and carers and repealing Council Directive 2010/18/EU
https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32019L1158

successful, but the actual implementation took the form of different solutions.[8]

However, the implementation of the European Union's equal opportunities strategy is not only integrated into the everyday life of the Member States through the above-mentioned legal instruments, but we can also see significant results from the side of the Court's work. The Court of Justice of the European Union (hereinafter: CJEU) has interpreted the provisions of those acquis in a number of cases based on disputes and difficulties of interpretation in the Member States. It may, therefore, also be important to present some relevant cases in order to ensure a complete analysis.

The main question in the Marschall-case[9] was whether a national rule discriminating positively against female workers in certain sectors, where there are typically more men than women, is contrary to EU law.

In the present case, the CJEU did not find the Member State's solution unlawful, stating that male and female candidates with the same qualifications on the basis of their competence and professional performance do not preclude national legislation which gives priority to female employees in such situations, provided that it is granted in each individual case to male applicants with the same qualifications as female applicants, that the proposal is assessed objectively which takes into account all criteria relating to the identity of the candidates and excludes any advantage for female candidates, provided that one or more criteria tip the balance in favour of the male candidate and that those criteria are not discriminatory in relation to female candidates.

In the Hakelbracht-case[10], the national court searched the answer to the question, whether in national legislation, when in a situation where a person who considers himself to be the victim of discrimination on grounds of sex has lodged a complaint, an employee who supports him in that context is protected from retaliatory measures taken by his employer only if he or she has acted as a witness during the examination of that complaint, and his

---

[8] Of course, the European Union monitors the processes of implementation in the Member States, the results of which can also be found in the indicated sources for all the above-mentioned directives.

[9] Case C-409/95. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A61995CJ0409

[10] Case C-404/18
https://curia.europa.eu/juris/liste.jsf?nat=or&mat=or&pcs=Oor&jur=C%2CT%2CF&num=C-404%252F18&for=&jge=&dates=&language=en&pro=&cit=none%252CC%252CCJ%252CR%252C2008E%252C%252C%252C%252C%252C%252C%252C%252C%252C%252Ctrue%252Cfalse%252Cfalse&oqp=&td=%3BALL&avg=&lgrec=hu&lg=&page=1&cid=2118038

testimony complies with the formal requirements prescribed by the relevant regulations. In that judgment, the CJEU stated, in addition with its previous practice, that the principle of effective judicial review would be deprived of the essence of its effectiveness if the protection afforded by it did not extend to measures which an employer may take in response to an action brought by an employee to ensure compliance with the principle of equal treatment. The fear of similar measures, against which no judicial remedy is available, would risk discouraging workers who consider themselves victims of discrimination from enforcing their rights before the courts and, consequently, would seriously jeopardise the attainment of the objective pursued by the provisions of the directive under examination.

However, in order to ensure that gender equality did not end with the processes described in this chapter, it is noted that it is being updated nowadays. There are still many areas where efficiency can be improved, or further action is needed.

1.2 SOCIAL JUSTIFICATION – *Luna Carpinelli*

Gender discrimination in academia limits the potential and opportunities of individuals based on their gender identity. Women and other marginalized genders have historically been underrepresented in various academic disciplines and leadership positions. Improving actions for gender equality in academia helps address this issue by actively working towards increasing the representation and visibility of underrepresented groups.

Gender equality in academia fosters a more inclusive research environment, leading to a wider range of research questions, methodologies, and perspectives. When diverse voices are included, research becomes more comprehensive, relevant, and innovative. It allows for a better understanding of societal challenges and the development of effective solutions that benefit all members of society.

Gender equality initiatives in academia promote a culture of respect, inclusivity, and support. This benefits not only individuals directly impacted by gender disparities, but also creates an environment where all academic community members can thrive. By fostering a culture that values diversity and gender equality, academia can attract and retain talented individuals from all backgrounds, leading to a more vibrant and productive academic community.

The key reasons for implementing a gender equality programme in academia are:

- **Equal opportunity**: Gender equality ensures that everyone, regardless of their gender identity, has equal access to educational and professional opportunities. By implementing a gender equality program, academia can strive to create a level playing field, where individuals are evaluated based on their abilities, skills, and qualifications rather than their gender.

- **Addressing discrimination**: Historically, women and other marginalized genders have faced discrimination and bias in academia, leading to underrepresentation and limited career advancement. A gender equality programme helps to challenge and rectify these disparities by promoting inclusive practices and combating systemic biases that hinder the progress of underrepresented groups.

- **Diverse perspectives**: Gender equality in academia is not just a matter of fairness; it also enriches the learning environment. When diverse perspectives, experiences, and ideas are included, academic discussions become more robust and innovative. By promoting gender equality, academia can tap into the full potential of its diverse talent pool, fostering creativity, critical thinking, and collaboration.

- **Role modeling and mentorship**: A gender equality program can facilitate the establishment of mentorship and sponsorship initiatives. This provides women and other marginalized genders with access to role models who have successfully navigated the academic career path. Such mentorship opportunities can inspire and empower individuals to pursue their academic aspirations, ultimately leading to greater diversity and representation in higher-level positions.

- **Enhancing research quality**: Gender equality is vital for the advancement of knowledge and research. By encouraging a more diverse range of researchers and scholars, academia can generate new perspectives and insights, leading to more comprehensive and well-rounded research outcomes. Gender-balanced research teams are more likely to address a broader range of research questions and produce more relevant and applicable work to diverse populations.

- **Social progress and equality**: Implementing a gender equality programme in academia aligns with broader societal goals of gender equality and social progress. Academia plays a crucial role in shaping public opinion, policy making, and societal norms. By championing gender equality, academia can

contribute to a more inclusive and equitable society, promoting the principles of fairness, respect, and equal rights for all.

Academia plays a crucial role in shaping societal values, norms, and policies. By actively working towards gender equality, academia can contribute to broader societal progress and the advancement of gender equality in other sectors. It sends a powerful message to society about the importance of equal rights, opportunities, and representation for all individuals, ultimately contributing to a more just and equitable society.

In conclusion, improving actions for gender equality in academia is socially important as it reduces discrimination, promotes equal access to education, addresses underrepresentation, enhances research and innovation, cultivates a supportive academic culture, and contributes to broader societal progress. It is a necessary step towards creating a more equitable and inclusive academic community and society as a whole.

1.3 MAIN CONCEPTS, TERMS, AND IDEAS IN THE SPACE OF GENDER EQUALITY POLICY – *Marina Appiou Nikiforou*

We will give the definition of the main terms used in gender research. These terms are from various sources, as stated at the end of this section. Our main objective is to provide easy-to-understand definitions which include only the main terms and concepts related to gender and education.

Bias (Prejudice) refers to an inclination or preference, especially one that interferes with impartial judgement. It is a form of prejudice that results from the universal tendency and need of individuals to classify others into categories.

Diversity is the presence of different and multiple characteristics that make up individual and collective identities, including race, gender, age, religion, sexual orientation, ethnicity, national origin, socioeconomic status, language, and physical ability.

Gender is socially defined as culturally learnt differences between men or women. It defines men and women with reference to the social cultural relationships between them. Definitions of men and women vary among cultures, from place to place, over time, and context.

Gender analysis is a systematic approach for examining problems, situations, projects, programmes, and policies to identify the gender issues and impacts. Gender analysis must be done at all stages of the development process and should consider how a particular activity, decision, or plan will affect men differently from women.

Gender awareness is the recognition of the fact that the life experiences, expectations, and needs of women and men are different, that they lead to inequality and are subject to change.

Gender blind ignores or fails to address the gender dimensions in any given project or research. It ignores gender biases that exist in society. It usually uses gender-blind terms which may result in girls and women and boys and men becoming invisible.

Gender discrimination is defined as: "Any distinction, exclusion or restriction made on the basis of sex which has the effect or purpose of impairing or nullifying the recognition, enjoyment or exercise by women, irrespective of their marital status, on the basis of equality of men and women, of human rights and fundamental freedoms in the political, economic, social, cultural, civil or any other field." (United Nations, 1979. 'Convention on the Elimination of all forms of Discrimination Against Women'. Article 1). Discrimination can stem from both law (*de jure*) or from practice (*de facto*).

Women's and men's **empowerment** refers to men and women taking control of their lives, setting their own agendas, gaining skills, increasing self-confidence, solving problems, and developing self-reliance.

Gender equality means that the different behaviours, aspirations, and needs of women and men are considered, valued, and favoured equally. It does not mean that women and men have to become the same, but that their rights, responsibilities, and opportunities will not depend on whether they are born male or female.

Gender equity is where individuals are given different support to participate equally, according to their respective needs.

Gender liberation is where inequity is addressed and all systemic barriers are removed.

Gender mainstreaming is a strategy for making women's as well as men's concerns and experiences an integral dimension of the design, implementation,

monitoring, and evaluation of policies and programmes in all political, economic, and societal spheres so that both women and men benefit equally. The ultimate goal is to achieve equality.

Gender neutral is when gender is not considered relevant to developmental outcomes. Gender norms, roles, and relations are not affected by the technology or change.

Gender relations is a term that emphasizes the relationship between men and women as demonstrated by their respective roles in power sharing, decision making, the division of labour, both within the household and in society at large.

Gender responsiveness is where outcomes can be achieved by ensuring that both men and women are included equitably in the activities of the research programme.

Gender role stereotyping refers to the portrayal, in media or books or conversations, of socially assigned gender roles as "normal" and "natural".

Gender roles are norms of behaviour, values, and attitudes deemed appropriate for men and women. These roles are assigned by social criteria rather than biological criteria.

Gender sensitive is the ability to acknowledge gender differences and to develop strategies to address gender norms, roles, and access to resources so far as it is needed to reach project goals.

Implicit Bias (Hidden or Unconscious Bias) is the unconscious attitudes or stereotypes that affect a person's understanding, actions, or decisions as they relate to people from different groups.

Inclusion is creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to participate fully.

Intersectionality is the acknowledgment that everyone has their own unique experiences based on the intersection of their social identities; that is gender, sex, class, geographical area, ethnicity, wealth, and social relations.

Sex refers to the biological characteristics that define humans as female or male. It defines males and females independently of each other. This definition is universal.

Sex-disaggregated data or **Gender-disaggregated data** are any data that is cross-classified by sex that is presented separately for both women and men, girls and boys, and that considers women's and men's realms, realities, conditions, and situations.

REFERENCES

- https://eige.europa.eu/gender-mainstreaming/glossary
- https://trainingcentre.unwomen.org/mod/glossary/view.php?id=36&mode&hook=ALL&sortkey&sortorder&fullsearch=0&page=-1
- https://www.unicef.org/rosa/media/1761/file/Genderglossarytermsandconcepts.pdf
- https://www.naco.org/resources/featured/key-terms-definitions-diversity-equity-inclusion
- https://pdf.usaid.gov/pdf_docs/Pnadl089.pdf

CHAPTER 2

GENDER-SENSITIVE RESEARCH - DIAGNOSIS, MONITORING AND EVALUATIONS

2.1 GENDER-SENSITIVE DIAGNOSIS – *Jolanta Klimczack, Marta Margiel*

Gender-sensitive diagnosis is an analytical process and evaluation that considers gender differences and the impact of gender on an issue, situation, or social problem. Such diagnosis aims to identify and make an action plan. Gender-sensitive diagnosis can be applied in various fields, such as politics, the economy, education, health, employment, urban planning, architecture, or social services.

Various research methods, such as statistical data analysis, interviews, field observations, or document analysis are used in gender-sensitive diagnoses. What distinguishes the use of these methods in gender-sensitive diagnosis from conventional approaches is the need to include a gender perspective at every stage, starting as early as the data collection process, through the involvement of different social groups and expert individuals with diverse perspectives and experiences in the diagnostic study, to the description, analysis, and conclusions treating gender as a dependent variable.

A gender-sensitive diagnosis aims to provide a deeper understanding of gender inequalities, to identify the causes and mechanisms of gender inequalities, and to identify specific areas for intervention and action to promote gender equality, eliminate discrimination, and gender stereotypes.

The results of a gender-sensitive diagnosis can inform the development of strategies, policies, programmes, and projects that address the needs and aspirations of different gender groups and promote gender equality and sustainable social development.

Gender-sensitive diagnosis in the university is a process of analysis and evaluation that aims to identify existing gender inequalities and their causes

and effects. It can range from a survey of attitudes to gender among students and staff to an analysis of the university's policies, programs, and activities to include gender equality.

Here are some steps that may be useful in conducting a gender-sensitive diagnosis at the university:

- Step one:

Data collection, i.e., collecting data on gendered aspects of the university, such as demographic data on students and staff, statistics on recruitment and promotion, information on access to resources such as laboratories, libraries or scholarships, and development opportunities, as well as research findings on gender inequalities at the university.

- Step two:

Analyse the data collected, identifying gender differences and inequalities in different university areas, paying attention to aspects such as gender representation in various academic disciplines, at different staffing levels, promotion dynamics, salary levels, participation in decision-making bodies, or access to training and support.

- Step three:

Identify the causes of existing gender inequalities at the university, such as gender stereotypes, cultural barriers, unequal distribution of duties and responsibilities, lack of work-life balance, and lack of programmes to support gender equality.

- Step four:

Evaluate the university's policies, activities, and programmes in mainstreaming gender equality; assess, implement, actual impact, and areas for improvement.

- Step five:

Conclusions and recommendations based on the collected data and analysis aimed at improving gender equality at the university; identification of specific actions that can be taken to enhance gender equality in recruitment, employment, promotion, training, policies, and organizational culture.

- Step six:

Monitor progress in implementing gender equality recommendations and strategies at the university; systematically assess change and adjust actions as needed.

A gender-sensitive diagnosis at the university requires the collaboration of different stakeholders such as university authorities, staff, male and female students, and social organizations such as trade unions; it is essential to involve all parties and to create an environment where gender equality is a priority.

The GEP must be based on the data collected and critically analysed on, for example, the institution's staff, broken down by gender and about various categories of staff and their role in the institution's structure or incidents of sexual harassment. Some data will be available from existing administrative sources (HR department), while others may need to be specifically collected or calculated. The information analysis will help guide the GEP's priorities, which should be evaluated annually based on identified indicators.

Most often, the diagnosis includes data on the following:
– the list of data;
– data processing, i.e., how the data were counted by type of data (quantitative, qualitative, etc.);
– analysis of the data concerning 50/50, i.e., gender interpretation;

This comprehensive approach enables the organisation to understand progress better, identify where actions are impacting, and where obstacles to gender equality persist throughout the life of the GEP.

data extraction → data processing → data analysis
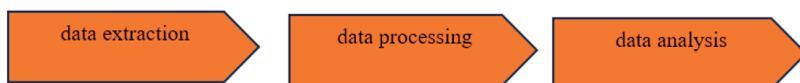
2.2 GENDER-SENSITIVE EVALUATION – *Jolanta Klimczack, Marta Margiel*

The process of conducting an evaluation can be divided into four stages:
1. Structuring - planning the evaluation design
2. Observation - collecting data
3. Analysis
4. Evaluation - formulating value statements

We can choose the following types of evaluation:

Ex-ante evaluations are carried out before the adoption of the final version of a document, programme, or strategy. They serve to estimate the expected effects and to assess whether the assumptions of the intervention correspond to the needs and are realistic.

Mid-term evaluations are carried out halfway through the implementation of an intervention. They check whether the results achieved by that time are sufficient to achieve the objectives and, if not, suggest remedial action to be taken.

Ongoing evaluations are carried out during the implementation of the intervention, "as needed" and organised when there is a problem to be solved or a knowledge needs to be met.

Ex-post evaluations are carried out after the intervention has been completed, usually several years apart, so that all the significant effects of implementation have already become visible.

When preparing an evaluation, the following questions need to be answered:
– What should be studied, i.e., what is the subject of the evaluation?
– Why will the evaluation be conducted, i.e., what is the reason?
– For whom will the evaluation be conducted, i.e., what is its purpose?
– For whom will the evaluation be conducted, i.e., what is the planned schedule?
– By whom will the evaluation be conducted, i.e., who will carry it out?
– What financial resources will be used, i.e., what will be the cost of the evaluation
– What form will the evaluation report take, i.e., how will the results be presented?

The research question is a fundamental element of any research process. It is a formulated question that defines the purpose of the study and guides the data collection and analysis process. The research question is what the researcher wants to discover, understand, or investigate in the context of the research topic. The research question should be clear, specific, and precise. Ideally, it should be investigable using available research methods and techniques. It is also worthwhile for the research question to be related to an existing knowledge gap or social problem that needs to be better understood. The formulation of a research question requires consideration of several factors, such as the scope of the study, the social context, the availability of data and the resources available. A research question can be open-ended, whereby the researcher seeks to understand or interpret a phenomenon, or it can be more closed-ended, focusing on a specific hypothesis or relationship between variables. The research question is a key tool that guides the entire research work, from data collection to the analysis and interpretation of the results. The correct formulation of the research

question helps to focus on the essential aspects of the study and provides the basis for the study.

2.3 GENDER-SENSITIVE MONITORING – *Jolanta Klimczack, Marta Margiel*

Monitoring is a tool for improving management daily, guiding the daily activities of the plan and providing critical information for the evaluation we intend to carry out later. In this regard, monitoring can be defined as a continuous task that systematically collects data based on specific indicators to indicate progress and the achievement of the objectives and the resources used. Monitoring is crucial because it allows us to observe the activities being implemented. It also helps to identify and address potential sources of resistance to change. It will indicate whether the transformation dynamics are in place and whether we can achieve anything. It is important to remember that monitoring is not just looking at numbers and data, but also at other fundamental and qualitative aspects.

Gender-sensitive monitoring is the process of regularly collecting data and information on the gendered aspects of the operation of programmes, policies or activities implemented at the university to assess the effectiveness of the objectives formulated in the Gender Equality Plan (or other equality policy standards). Gender-sensitive monitoring aims to track changes in those areas that have been parameterised in the diagnosis and identified as the starting point for measuring progress in the implementation of the equality policy. Data are analysed, results are compared, and indicators are monitored. The results of gender-sensitive monitoring are essential for assessing progress on gender equality and identifying areas for corrective action. Gender-sensitive monitoring collects data on women, men, and non-binary people, considering gender differences and inequalities in different areas of university life. Gender-sensitive monitoring makes it possible to track and evaluate the effectiveness of gender equality measures and to legitimate decisions through the data collected.

RECOMMENDED SOURCES

• *Gender Equality in Academia and Research - GEAR tool*,
https://eige.europa.eu/gender-mainstreaming/toolkit/gear/step-step-guide/step-5?language_content_entity=en

- Zehra, S., Meckler, J.M., (2021) *Gender Equality in Monitoring and Evaluation: The GEI Approach*, https://www.globalevaluationinitiative.org/blog/gender-equality-monitoring- and-evaluation-Gei-approach

- Guidance Note 3.1: *Integrating gender equality in monitoring and evaluation*, (2020)
https://www.ilo.org/wcmsp5/groups/public/@ed_mas/eval/documents/pu blication/wcm s_165986.pdf

- Gumucio, T., Huyer, S., Hansen, J., (2018) I*nclusion of gender equality in monitoring and evaluation of climate services*,
https://cgspace.cgiar.org/handle/10568/99021

- Espinosa, J., Bustelo, M.,Velasco, M., (coord.) (2016) *Evaluating Gender Structure Change. Guidelines for Evaluating Gender Equality Action Plans*.

CHAPTER 3

USEFUL TOOLS FOR DIAGNOSIS, MONITORING AND EVALUATING IN GENDER AND DIVERSITY RESEARCH

PREFACE – *Ewa Jarosz*

Methodological rules for research constitute a set called a "methodology". Each field or area of science has its specific methodology. Thus, one can speak of methodologies in the humanities, social sciences, science and technology or natural sciences. One can also distinguish methodologies of particular disciplines, e.g. law, psychology, economy, management and sociology.

One can speak of methodology in two senses: theoretical or practical. The first one means a discussion of the findings of scientific research and, as such, their philosophical and logical foundations. In contrast, the second one represents the rules of the research process, logic and principles of research activities performed by researchers who want to identify a specific part of reality.

This handbook is practical, as it is a set of guidelines on how to carry out research activities to establish the state of play on gender equality in a given social reality, i.e. environment, organisation or institution. These indications can also be used to show progress made as a result of actions taken or to update needs, as well as in the evaluation process of an equality plan or programme adopted.

Research for developing equality and diversity policies or plans can be located at the intersection of many specific methodologies, disciplines and fields, in particular, the social sciences, including sociological sciences, legal sciences, psychology and pedagogy, political sciences, management sciences and others. It is, therefore, interdisciplinary research that uses methods developed and favoured in different disciplines and is often conducted by a multidisciplinary

team of people with different disciplinary competencies. Interdisciplinary research allows for a more comprehensive view of the situation and problems of gender equality and diversity, considering multiple perspectives.

In practical research on equality and diversity, different research orientations and methods can be used and mixed together depending on the objectives and needs. In this handbook, we, therefore, recommend the implementation of a research, the so-called 'mosaic approach' (a name so far used primarily for research conducted with children (Clark, A., and Moss, P. (2011). Listening to young children: The mosaic approach (Second edition). London: National Children's Bureau).

There is a broad spectrum of research methods to explore the various aspects of equality and diversity.

Social sciences, most generally, related to analysing human interaction, behaviour, social structures, social norms, values, social institutions and social phenomena and processes, have some research paradigms. Referring to the classical descriptions of research approaches in the social sciences, general orientations that stand out as fundamental are:

• **Quantitative research** is based on quantitative methods, i.e., methods that allow data collection that can be expressed by numbers and statistics. Examples include survey research, statistical analysis, measurement scales, controlled experiments, observations using quantitative indicators, administrative data analysis, and big data analysis. Quantitative research usually focuses on larger populations and groups to establish trends or patterns within them or the organisations in which they function.

• **Qualitative research** focuses on a more in-depth identification of problems and needs, intending to understand the situation, people's experiences, problems experienced, motivations, emotions, or subjective perceptions of reality. Examples are open-ended interviews, in-depth interviews, content analysis of documents or creations, and other methods to capture individual preferences and subjective reports, opinions, and judgements. Quantitative methods allow us to obtain detailed information about complex social phenomena and processes, paying attention to the context and the meaning people attribute to the situation or actions.

• **Mixed research** - quantitative and qualitative - combines, in a methodological sense, both orientations and applies methods and uses both

quantitative and qualitative data, usually to show the different levels of a phenomenon, i.e., the general perspective on the collective as well as the individual, aiming at a better and more complete presentation of the problem and its understanding.

In research on gender equality and diversity, it is not only how data are collected through various specific methods but also other aspects of the research conduct, including data analysis profiles, play an important role.

The following chapter describes the numerous data collection methods that are possible in gender equality research, as well as the possibilities for specific approaches to research implementation and data analysis.

3.1 SURVEY RESEARCH – *Luna Carpinelli*

Introduction

Survey research is a quantitative research methodology that involves collecting data and information from a sample of individuals through the administration of a structured questionnaire.

Features

Surveys are used in various fields, including social sciences, market research, psychology, and public health, to gather information about people's attitudes, opinions, behaviours, and characteristics. The data collected through surveys are often analysed statistically to draw conclusions and make generalizations about a larger population.

Procedure

Survey Design: The first step in survey research is designing the survey questionnaire. Researchers identify the research objectives and develop a set of questions that align with the study's goals. The questions can be closed-ended (e.g., multiple choice, rating scales) or open-ended (e.g., essay questions, free text responses). Careful attention is given to the wording, order, and format of the questions to ensure clarity and minimize bias.

Sampling: Surveys are typically conducted on a sample of individuals rather than the entire population. The process of selecting a representative sample is crucial for the survey's validity and generalizability. Various sampling techniques, such as random sampling or stratified sampling, can be employed to ensure that the sample represents the target population.

Data Collection: Surveys can be administered using different methods, including face-to-face interviews, telephone interviews, online surveys, or paper-and-pencil questionnaires. The chosen data collection method depends on factors such as the target population, the nature of the questions, and

available resources. Researchers must ensure confidentiality and anonymity to encourage honest and accurate responses.

Data Analysis: Once the survey responses are collected, they are typically processed and analysed using statistical software. Quantitative data from closed-ended questions can be analysed using descriptive statistics (e.g., frequencies, means) and inferential statistics (e.g., chi-square tests, regression analysis) to identify patterns, relationships, and differences. Qualitative data from open-ended questions are often subjected to thematic analysis or content analysis to identify recurring themes or patterns.

Interpretation and Reporting: The final step involves interpreting the survey findings and communicating the results. Researchers interpret the data in relation to the research objectives and draw conclusions based on the analysis. The results are typically presented in the form of tables, charts, and written summaries, often accompanied by discussions and implications for theory, policy, or practice.

Survey research provides a structured and efficient approach to collect large amounts of data from a diverse sample. It allows researchers to investigate a wide range of topics and provides valuable insights into people's opinions, behaviours, and characteristics.

The Tool - Questionnaire

The questionnaire is a data collection technique and is shaped by a set of written questions that the researcher administers or applies to persons or units of analysis, with the aim of obtaining the empirical information needed to determine the values or responses of the variables being studied.

Design

The questionnaire, both in its design and application, must take the following steps into consideration: determination of the objectives of the questionnaire, which refer to obtaining information for the analysis of the problem that is the reason for the research; identification of the variables to be researched, which guide the type of information to be collected; delimitation of the universe or population under study, where the questionnaire will be applied, the units of analysis or people who must answer the questionnaire, the size or type of sample of units of analysis that allows the informants to be identified and the quantity of them; selection of the type of questionnaire and form of administration; preparation of the questionnaire as a data collection instrument.

Pre-test or pilot test

Application of the questionnaire or fieldwork for data collection; criticism and coding of the collected information; process design and statistical analysis of the collected information.

Structure or parts of the questionnaire

The questionnaire generally has the following structure: title specifies to whom the questionnaire is addressed; introduction or presentation; summary of the objectives of the questionnaire, the population under study, the institution making it, anonymisation of the results to motivate the informants' co-operation. These data are necessary when carrying out the quality control process of the information collected.

In the final part where the name, address, and telephone of the person who made the questionnaire (when not self-administered) should be specified, as should the observations that this person wishes to make. In some studies, this part of the questionnaire also includes questions to be answered by the interviewer in case the informant cannot be found. These questions can also be answered with the collaboration of third parties.

Question system

This is a set of questions that form the body of the questionnaire and enable us to obtain information for the variables under study. The following scheme can be adopted:

Assumptions → Variables → Indicators → Questions

Consequently, all questions derived from the indicators form part of the body of the questionnaire. In turn, each indicator can give rise to a system of questions, depending on the type of population under study and the research objectives. Thus, one indicator gives rise to three types of questions.

Filter question or pre-condition is the one that differentiates the units of analysis to determine to whom the question will be applied that searches for the data being sought. Substantive question is the one that provides information for the sought-after indicator.

Analytical question allows for the collection of more specific data based on the possible answers that the informant provides in the substantive question.

Types of questions

In the questionnaire, questions are stimuli to which people are submitted with the aim of obtaining information to determine the value or response

of the variables being researched. In this sense, questions constitute the body of the questionnaire and can be of two types:

The closed or structured question: this is the one with answer alternatives presented to the informant for his/her choice. This type of question has the risk of not encompassing all the information the respondent can give, especially if the answer alternatives do not match the one the informant wants to give. Precisely for this reason, the list of answer alternatives should include an "other answer" response, with the possibility of writing down this other answer, to build up a source of information for analysis. The main benefit of this type of question is that it makes the statistical process and analysis easier.

Types of questionnaires

As mentioned above, the type of question determines the type of questionnaire. These can be:

– Questionnaires with closed questions
– Questionnaires with open questions
– Mixed questionnaires, mixing closed and open questions

This type of questionnaire is most used in social research for data collection. However, other types of questionnaire classifications could be made in relation to the form of administration: self-administered, and third-party administered; similarly, questionnaires can be simple or pre-coded.

Criteria for determining the type of question

The criteria that mainly guide the researcher in deciding whether a question should be closed or open are: the level of detailed information required for the analysis of the problem being studied; the complexity of the aspect of reality or topic to which the indicator refers, and which makes categorisation difficult; the knowledge of the reality being researched, and which consequently renders the possible response alternatives unknown on the part of the informant; and, the resources available (time and money) to process the information collected.

Requirements or conditions for a well-done application

A well-crafted question that enables the required information to be obtained must meet the following requirements: universality, i.e., that the question is comprehensible in the same way for all persons in the study universe or population where the questionnaire will be applied. In relation to this, the

question will have to be asked using the same vocabulary used for all the population under study. The comprehensibility of the questions can be tested during the pilot test.

Clarity of concepts, i.e., the question must express austerely what is to be measured, and the terms and concepts involved in it must not give rise to more than one interpretation. Precision, i.e., each question must seek only one piece of data. It must not give the possibility of mixing answers.

Forms of management or application of the questionnaire

The way the questionnaire is managed and applied depends on the type of population where the study will be done, the type of questions that form part of the questionnaire, and of the available resources (personnel, time, and money).

There are two main forms of managing or applying the questionnaire, with advantages and disadvantages: self-administered questionnaire, where the informant is the person filling in the questionnaire. In this case, the questionnaire is sent out and returned by post, or the researchers retrive it.

The main advantages in using this form of questionnaire application is that a greater degree of confidence is achieved on the part of the informant in giving the answers. The application is less expensive, so there is no need to supervise the interviewers; neither will their training be necessary.

The main disadvantages are that a high degree of non-response may be reported and there is no possibility of retrieving the information. Other people may intervene in the preparation of the answers, and thus, contaminate them. One may lose the questionnaire or part of it.

There are advantages to training people to conduct the survey. The high non-response rate can be avoided, as well as the low reliability of the data. Loss of the questionnaire is avoided. One obtains information in an expected.

3.2 INTERVIEW – *Luna Carpinelli*

Introduction

Interviews are a qualitative research methodology used in the social sciences to collect data and information of a subjective nature through direct dialogue with the participants. Interviews allow researchers to explore and gain an in-depth understanding of the participants' experiences, opinions, perceptions, and perspectives on a given topic of study.

Features

Below are some definitions and types of interviews commonly used in the social sciences:

Structured Interview: A structured interview is a form of interview in which questions are asked in a predetermined order and with fixed wording. The researcher follows a list of predefined questions and aims to obtain standardised answers from the participants. This type of interview is often used to collect quantitative data, e.g., to conduct polls or surveys.

Semi-structured interview: The semi-structured interview is a more flexible approach in which the researcher uses a list of guiding questions but has the freedom to explore further topics or ask for clarification during the interview. This type of interview allows for more interaction between the researcher and the participant, fostering an in-depth understanding of the participants' experiences and opinions.

Unstructured or open interview: The unstructured interview is a type of interview that is based on an open conversation between the researcher and the participant, without a predefined list of questions. The researcher provides space for free and spontaneous narration by the participant, allowing for greater exploration of individual experiences and perspectives.

Group interview or focus group: The group interview involves a moderator who facilitates a structured discussion among a group of participants. This type of interview encourages the sharing of opinions and views within the group and can be useful for exploring social dynamics, interactions and collective perceptions on a given topic.

Biographical interview: The biographical interview focuses on the participants' life experiences, encouraging them to tell and reflect on their personal history. This type of interview is particularly useful for understanding the influences and transformations that have shaped space between participants' lives in the social, cultural, and economic context.

3.3 FOCUS GROUP INTERVIEW – *Jolanta Klimczak*

Introduction

The development and popularisation of this technique was the work of the American sociologists Paul F. Lazarsfeld and Robert K. Merton. They first

used it to test the impact of propaganda messages during the Second World War. Subsequently, it evolved to become an approach implemented in social sciences and marketing. In the European tradition, it is known as 'group discussion'. Since the 1990s, feminist and gender critiques of scientific methodology have emphasized the androcentric model of social research. As a result, there has been a reconceptualisation of thinking and research based on Focus Group Interviews (FGIs), leading to new possibilities for this method. These include the creation of a relatively 'naturalistic' research, a consideration of the social context and a shift in the balance of power in research. FGIs have also proven useful in action research, particularly when involving underrepresented groups such as women experiencing intersectional discrimination. In addition, FGIs can contribute to consciousness-raising. (Wilkinson 1999, p.237). It involves a deeper analysis of a phenomenon and a search for answers to the questions: What is it like? And why is it like that?

Features

The method is based on a discussion involving a group of people (six to nine people, in US, to 12) lasting one to two hours on a given topic (research problem). The group is generally relatively homogeneous in terms of the selected criteria. It depends on the researchers' interests and what they want to know. Since focus group members are selected based on a trait or set of features, and not randomly, the group interview is conducted with a purposive sample. (In a university, these may include academics, researchers, support staff, top management, students, and external stakeholders).

FGI is a method where group dynamics during discussions and interactions among respondents are considered extremely important. Participants stimulate each other to speak up, to confront their opinions with the opinions of others, to have the opportunity to engage in polemics, to justify their arguments, and to verify their views. They can react to the comments of others, turn to each other naturally, ask questions, develop ideas, inspire, evoke memories, modify communication and utterances, complete statements, control stereotypical thinking, distinguish different units, learn how to use argue and change their opinions. These social interactions are conducive to revealing needs, intentions, expectations, and social attitudes, including prejudices.

The focus discussion is led by a moderator (also acting as a facilitator) who should consider the consequences of group dynamics in terms of positive effects (such as synergy, snowball effect, stimulation, safety, and spontaneity), negative effects (such as groupthink, group polarization, social loafing, group

incompatibility) and consistently implement the study scenario. The moderator does not take a position on the issues raised and does not value the opinions of individual participants (assuming that they are equivalent) and is expected to be able to listen with attention and empathy, to show interest in the opinions of all participants, to not their assessments, to be familiar with the issues under discussion, to create a friendly atmosphere, and to skilfully non-directive manage the discussion in the group.

Procedure

The focus method assumes an unstructured way of obtaining information, but this does not mean an utterly free discussion. The interview should be based on a previously developed framework moderation scenario, considering all issues of interest to the researcher in the form of a list of topics to be discussed.

The focus meeting (session) consists of three parts. In the first part of the study, the moderators should welcome the participants, introduce themselves, explain the topic and purpose of the study, discuss the rules of participation (confidentiality, anonymity, etc.), specify the duration of the meeting, underline what is expected from the participants and receive a written statement about the conscious decision to participate. Here, the moderator prepares the participants for the discussion by creating a friendly atmosphere, asking relaxing questions or simple tasks (for example, can you write your name on a piece of paper?). In the second part, the moderator proceeds to ask questions according to a previously developed scenario. The discussion focuses on several research questions directing attention to a selected phenomenon and looking at it from many points of view. The moderator formulates specific, short, and understandable open ended questions on one aspect (for example, how...?, why...?, under what circumstances...?). Questions in focus groups should use the funnel technique, i.e., in the beginning, there should be open ended questions, taking up a given topic from a broader perspective, and then to detailed questions gradually in subsequent steps. It is also essential to formulate questions about the studied phenomenon's positive and negative aspects. In the third part, the moderator checks whether everything has been said and adequately understood and at the end of the meeting, there is a return to more general matters, a summary.

Ideally, 3-5 focus sessions should be planned in one project.

After the sessions, the recorded material is transcribed. Depending on the research goals, transcription involves saving everything that has been recorded

or only what is substantively relevant. The essence of elaborating on the results of the focus group study is the words and contexts in which they were used by the participants, reproducing their way of perceiving the phenomenon and the logic of reasoning. Non-verbal messages are also used in the analysis to varying degrees. We often use software for qualitative computer data analysis (OpenCode, Atlas, NVivo) to analyse the collected material, combining individual statements broader meaning or saturated categories and their subcategories. Then comes the synthesis process. The formulated conclusions and recommendations refer to the information obtained from the groups and are limited to typological generalizations.

Advantages of the method include saving time by obtaining information from a few or even a dozen or so people at the same time; the information richness of the data obtained, including the specificity of the language and argumentation structures used by the participants; the pro-social nature of the research, which is conducive to the emergence of information in conditions similar to the natural process of interaction exchange; relatively symmetrical researcher-subject relationship, eliminating formalism; this contact is typical of other research methods; flexibility allowing the researcher to diversify the research structure when planning the scenario of the research session; the ability to modify the scenario during the session and from session to session; relatively fast results; a chance for the emergence of threads that were not included by the researcher and perhaps would not have taken place during an individual interview; and, positive group effects affecting group dynamics.

However, one should also remember the limitations resulting from the specificity of FGI as a method, like potentially (too) considerable influence of the moderator on the quality of the information obtained (e.g., too general, superficial, not exhaustive, suggested, imposed) and group dynamics (bad atmosphere, dominance of one participant, lack of a sense of anonymity and confidentiality); making interpretation errors in the analysis phase of the received data or even subjectivism during the development of empirical material; difficulties in assembling focus groups or using incorrect criteria for selecting participants; when participants express certain views, speak about feelings, experiences, and opinions, without the possibility of diagnosing actual behaviour; the emergence of negative group effects and the difficulty in estimating the true value of the research material obtained.

Disadvantages of the method: obtaining superficial, not very deep, or insufficiently substantiated information due to moderator errors; the negative impact of the moderator on the course of group dynamics leading to a decrease in the value of the obtained material; the possibility of getting data proposed by the moderator or dominant participant; making interpretation errors in the analysis phase of the received data; the subjectivity of the analyst developing the empirical material; no possibility to guarantee confidentiality by session participants; lack of anonymity, which may distort participants' statements; difficulties with completing focus groups; using inappropriate recruitment parameters; participants formulating declarative views that are not reflected in their actual behaviour; lack of prognostic properties. FGI research is more helpful in obtaining information about the experiences, feelings, and views of debaters than in predicting their future behaviour; the emergence of multiple overlapping negative group effects and the impossibility of estimating the actual value in this context of information obtained.

Applicability to gender/diversity research

The nature of the research is aimed at obtaining information in an environment close to the natural process of interaction, which in the case of gender/diversity issues, is conducive to openness and honesty. The relatively symmetrical researcher-subject relationship eliminates the formalism typical of other research methods, allows for scenario modification during and from session to session, and identifies issues the researcher did not consider and may not have appeared in an individual interview or survey. The method is beneficial in studying people deriving from sensitive groups (such as older women, LGBTIQ+) and sensitive issues (such as violence, discrimination). The positive effect of group dynamic processes is increased gender awareness and the empowerment of participants and the researcher.

Resources

• Lisek-Michalska, J., (2013). B*adania fokusowe. Problemy metodologiczne i etyczne. Łódź: Wydawnictwo Uniwersytetu Łódzkiego* [*Focus research. Methodological and ethical problems*. Łódź: Wydawnictwo Uniwersytetu Łódzkiego], https://dspace.uni.lodz.pl/bitstream/handle/11089/31412/Lisek-

• Łobocki Ł., (2005). *Zogniskowane wywiady grupowe jako metoda badawcza w polityce społecznej na przykładzie badań nad migracjami międzynarodowymi, Problemy Polityki Społecznej* (*Focus group interviews as a research method in*

social policy on the example of research on international migration, Problems of Social Policy), 2005; 8:161–176
http://www.problemypolitykispolecznej.pl/Zogniskowane-wywiady-grupowe-jako-metoda-nbadawcza-w-polityce-spolecznej-na-przykladzie,123469,0,1.html

• Wilkinson, S., (1999) *Focus Groups. A Feminist Metod*. *Psychology of Women Quarterly*, 23, 221-244
https://thestory.is/pl/journal/badania-fokusowe-grupy-fokusowe/

Recommended Resources

• https://www.nngroup.com/articles/focus-groups/
• https://www.userinterviews.com/ux-research-field-guide-chapter/focus-groups
• https://www.usability.gov/how-to-and-tools/methods/focus-groups.html
• STEM, International Journal of Advanced Culture Technology Vol.8 No.3 280-284 (2020)
DOI https://doi.org/10.17703/IJACT.2020.8.3.280

3.4 CASE STUDY – *Andri Christoforou*

Introduction

A case study can be conceptualized as a method used to collect information systematically about a specific case. The case can be one individual, one group, a social setting, or an event, among others. The aim of the case study approach is to enhance our understanding of how the unit of our analysis operates or functions.

Features

The case study approach falls under the "social constructivist" perspective in social science. Its underlying assumption is that "social reality" is created through social interaction which occurs in socio-cultural, historic, and political contexts.

Overall, the case study approach favours in-depth investigation rather than merely description. Multiple research methods and data sources are, therefore, usually utilized including observation, interviews, documentary analysis, or any other method that would yield rich and detailed data. The exact methods to be used in a certain case study depend on a number of factors such as the purpose of the study, the availability of resources, disciplinary background, as well as the case itself.

The major advantage of case studies is that they allow for in-depth analysis of cases, while representing the subjects' perspective.

Procedure

Although the procedure varies depending on the research context and theoretical framework, the method typically involves the following steps:

Definition of the research questions: these questions should guide the selection case to investigate, as well as the type of analysis.

Selection of case: Identification of potential cases that are relevant to the topic and justification for the case(s) chosen.

Decision on the research design, including methods of data collection.

Data Collection: Triangulation (using multiple sources of data) is recommended to ensure validity and reliability.

Data Analysis: Performed according to the data collection methods utilized.

Interpretation and Analysis: addressing research questions, conclusions, implications.

Applicability to gender/diversity research

Case studies on gender equality in academia can provide valuable insights that can be used for the diagnosis of an existing situation, as well as for the monitoring and evaluation of initiatives geared towards gender equality. The case could be a specific department, a group of academics, a policy, an initiative, a curriculum, a research project, a series of trainings, etc. Examples of case studies that have been conducted in the area include the case of a Physics faculty at a Swedish university (Viefers et al., 2006), the experiences of women academic managers in an Australian University (Kloot, 2004), the case of organisational resistance to gender equality in an Irish university (Hodgins et al., 2022), and the staff and students' experiences of sexual harassment in a UK university (McCarry & Jones, 2021). Multiple cases can also be used for a comparative analysis (e.g., Nielsen, 2016).

References

• Berg, B. L., & Lune, H. (2017). *Qualitative research methods for the social sciences*, (9th ed.) Pearson.

• Hodgins, M., O'Connor, P. and Buckley, L.-A. (2022). *Institutional Change and Organisational Resistance to Gender Equality in Higher Education: An Irish Case Study*. *Administrative Sciences*, 12(2), p.59. doi:10.3390/admsci12020059.

• Kloot, L. (2004). *Women and leadership in universities: a case study of women academic managers*. *International Journal of Public Sector Management*, 17(6), pp.470–485. doi: 10.1108/09513550410554760.

• McCarry, M. and Jones, C. (2021). *The equality paradox: sexual harassment and gender inequality in a UK university*. Journal of Gender Studies, 31(8), 1–13. doi:10.1080/09589236.2021.2007471.

• Nielsen, M.W. (2016). *Scandinavian Approaches to Gender Equality in Academia: A Comparative Study*. *Scandinavian Journal of Educational Research*, 61(3), 295–318. doi: 10.1080/00313831.2016.1147066.

• Somekh B. & Lewin C. (2005). *Research methods in the social sciences*. SAGE Publications.

• Viefers, S.F., Christie, M.F. and Ferdos, F. (2006). *Gender equity in higher education: why and how? A case study of gender issues in a science faculty*. *European Journal of Engineering Education*, 31(1), 15–22. doi:10.1080/03043790500429948.

Recommended Resources

• Lewis-Beck, M. S., Bryman, A., & Liao, T. F. (Eds.) (2004). *The SAGE encyclopedia of social science research methods*. (Vols. 1-3). SAGE Publications.

3.5 DIARY RESEARCH – *Andri Christoforou*

Introduction
Diary research is an effective method for collecting data on a regular basis directly from participants. Serving as research instruments, the diaries offer researchers in-depth insights into the participants' experiences, behaviours, thoughts, and interpretations on the topic of interest. Although diary research can accommodate both quantitative (e.g., structured, fixed responses and checklists) and qualitative (e.g., open-ended prompts) approaches, as well as mixed methods designs, the most common form of the diary research is the qualitative diary method.

Features
Qualitative diary methods encompass diverse formats like handwritten, electronic, visual, audio, video, and online diaries. Data collection methods commonly include open-ended questions or prompts, where participants can express their views in a non-structured format.

This kind of research presents numerous advantages, including the collection of experiences from the participants own point of view without the interference of researchers, the provision of context-specific details which offers a holistic understanding of the topic, the sensitivity of data in terms of time (i.e., data are based on current occurrences rather than relying on retrospective interpretation), and the collection of sensitive information in an unintrusive manner.

It is common for researchers to supplement diary data with interviews the participants to address incomplete information or ask for further clarifications. The data collected through diaries are usually analysed through thematic and/or content.

Procedure

The method typically involves the following steps:

Formulation of research questions;

Study Design and Planning, including population and sample selection (e.g., number and characteristics of participants), and decisions on the diary format;

Recruitment of participants and Informed Consent;

Provision of clear guidelines to the participants (e.g., what participants should include in their diary entries, frequency, and duration of diary entries);

Data Collection: Regular communication between the researchers and the participants, monitoring of the process, follow-up interviews if needed;

Data Analysis: Transcription if needed, coding and theme development; and,

Interpretation and Analysis: Addressing research questions, conclusions, implications.

Applicability to gender/diversity research

Diary research is an effective method for gaining insight, especially into sensitive topics, from the participants' own point of view. It can be utilized for topics pertaining to all aspects of gender equality and diversity in academia, although the organizational preparedness to engage with potentially sensitive research findings to proceed with interventions should be taken into consideration. Diary studies are particularly useful for the diagnosis of an existing situation. Plowman's (2010) research, for example, explored gender norms and practices within organizational culture by asking employees to keep diaries reflecting on gender-related aspects within their workplace. Similarly, Swim et al. (2001) utilized the findings of three daily diary studies to investigate the frequency, nature, and effect of everyday sexism

on university students. Finally, diary research can also be used for monitoring and evaluating institutional procedures, policies, and interventions for the enhancement of equality, diversity, and inclusiveness.

References

• Hyers, L.L. (2018). Diary Methods: Understanding Qualitative Research. Oxford University Press.

• Lischetzke, T. (2014). Daily Diary Methodology. In: Michalos, A.C. (eds) *Encyclopedia of Quality of Life and Well-Being Research*. Springer, Dordrecht. https://doi.org/10.1007/978-94-007-0753-5_657

• Plowman, P.J. (2010). The diary project: revealing the gendered organisation. *Qualitative Research in Organizations and Management: An International Journal*, 5(1), 28–46. https://doi.org/10.1108/17465641011042017

• Swim, J.K., Hyers, L.L., Cohen, L.L. and Ferguson, M.J. (2001). Everyday Sexism: Evidence for Its Incidence, Nature, and Psychological Impact from Three Daily Diary Studies. *Journal of Social Issues*, 57(1), 31–53. https://doi.org/10.1111/0022-4537.00200

• Unterhitzenberger, C. and Lawrence, K. (2022). Diary method in project studies. *Project Leadership and Society*, 3, p.100054. doi: https://doi.org/10.1016/j.plas.2022.100054

• Gilbert, N. (1993). Social Research Update 2: Using diaries in social research. Available at: https://sru.soc.surrey.ac.uk/SRU2.html.

More Resources

• Lewis-Beck, M.S., Bryman, A. and Liao, T.F. (2004). The SAGE encyclopedia of social science research methods. Thousand Oaks, Calif.: Sage.

3.6 GREY LITERATURE – *Janet Mifsud*

Introduction

The term grey literature is used to describe a huge range of various types of information that is normally not included in bibliographies, bibliographic databases or scientific abstracting and indexing services since they are not printed nor distributed using normal publishing channels.

Features

Such grey literature normally includes material from research reports or newsletters, interviews, working papers, theses, white papers, the Internet such as e-mail discussion lists, social media material from tweets, wikis, discussion forums, blogs, podcasts etc., guidelines, policy documents and market reports, technical reports produced by government departments, academics, business and industry. This material can be searched using some standard bibliographic services on the Web (such as Dissertation Abstracts), others manually through websites.

Procedure

While this material may never be published in a peer-reviewed scholarly journal, it can be considered by some to be an important research resource since it avoids the potential bias of researching only papers with statistically significant results since such publishers may have a more profit-based publishing strategy. Moreover, with formally published research literature, this can only be available sometimes after a lengthy peer review and editorial publishing process, while grey literature may be more current and provides information about emerging research. In addition, the sources in grey literature may be more diverse, creative and innovative, since mainstream commercial publishers may have a more conservative and traditional content.

Applicability to gender/diversity research

Researchers should be aware that grey literature sources can vary hugely in terms of quality since there is no peer review involved, and thus, there may be inherent bias in the information provided. Researchers using grey literature need to learn how to use their personal expertise, judgement and critical thinking skills in order to correctly assess this type of information. They also need to develop appropriate arguments in order to be able to properly assess whether the material in such sources has the necessary quality, reliability and potential bias to be considered worthy of reporting.

In addition, since grey literature is not formally published, and is very often only found on the Internet, it may be difficult to identify an author, sometimes even an exact date as to when the material was written as well as the exact source of the data and information being reported. Researchers using grey literature should carefully assess and consider the exact aim of the search and the type of information needed in order to ensure that the search in such

literature is appropriately targeted. This is especially even more so since some of this material can be hard-to-find and there can be a lot of it, sometimes providing conflicting information relayed in an unorganised manner. Sifting through the grey literature, as well as locating the information requested can be a major time-consuming task since it could require hand searching such material as blogs, newspaper reports, conference proceedings, contacting researchers which would not be properly indexed. It is applicable to gender/diversity research in that there is a great deal of anecdotal evidence in grey literature on gender and diversity which, if sourced, can provide key evidence in establishing further research in this field.

The search through such literature can be facilitated using specialized documentation centres. Such as the international interlibrary OCLC system in the US and the British Library in the UK. Librarians can be an excellent source of knowledge of such literature and this type of expertise is being developed into a speciality.

References

• *Management and Use of Grey Literature in Special Libraries*. Available from: https://www.researchgate.net/publication/346189736_Management_and_Use_of_Grey_Literature_in_Special_Libraries [accessed Feb 08 2023]

• Third International Conference on Grey Literature in 1997 (ICGL Luxembourg definition, 1997 - Expanded in New York, 2004).

Recommended Resources
(examples of sources helpful to broaden the knowledge)

• *Grey literature: What i is Grey Literature?*, Monash University https://guides.lib.monash.edu/grey-literature/whatisgreyliterature

• W*hat is gray literature? How do I search for it?* John Hopkins University https://welch.jhmi.edu/get-help/what-gray-literature-how-do-i-search-it

• Marsolek, W., Farrell, S.L., Kelly, J.A. & Cooper, K. Grey literature - Advocating for diverse voices, increased use, improved access, and preservation. *College and Research Libraries News*, Vol 82, No 2 (2021) https://crln.acrl.org/index.php/crlnews/article/view/24807/32644

3.7 DESIGN THINKING– *Roderick Vassallo*

Introduction

Design thinking is a human-centered approach to problem solving involving empathy, experimentation and step-by-step processes. It is used to understand the needs and viewpoints of the people for whom a product/service is being designed, and to come up with creative solutions that meet those demands.

Features

Design thinking encourages a non-linear and flexible approach to problem solving, and it can be applied to a wide range of disciplines and situations. It has been used in product design, service design, and urban design amongst other things. The goal of design thinking is to create innovative, user-centered solutions that meet real-world needs.

Design thinking can be applied in various sectors, including healthcare and finance. In healthcare, design thinking aims to enhance the patient experience by understanding their needs and creating user-centered spaces in hospitals. This approach seeks to reduce patient stress and increase overall satisfaction. In the financial sector, design thinking is used to improve the customer experience of online banking. By empathizing with customers and identifying the limitations of existing platforms, design thinking enables the redesign and introduction of new features that enhance usability and efficiency. Ultimately, this results in increased customer satisfaction and usage of the platform.

Procedure

The method typically involves the following steps:

1. Empathize: Understand the problem from the perspective of the user by conducting research and gathering insights. This step is crucial, as it provides the foundation for all the following steps. Understanding the needs, wants, and pain points of the user is essential to be able to design a solution that is relevant and useful to them.

2. Define: Clearly articulate the problem and identify key opportunities for novelty and original solutions. This step helps to focus on the most important aspects of the problem and to create a clear problem statement that can guide the design process.

3. Ideate: Generate a wide range of ideas, and possible solutions through brainstorming and other creative techniques. This step is about

generating as many possible solutions as possible, without judging them or filtering them too much. The goal is to have a wide range of options to choose from.

4. Prototype: Create a representation of one or more of the best and crucial ideas. This step is about taking one or more of the ideas generated in the previous step and creating a tangible representation of them. This can be a physical model, a paper prototype, or a digital prototype.

5. Test: Gather feedback on the prototype and use it to inform further development. This step is crucial to validate the assumptions made in the previous steps and to gather feedback from real users. This feedback is then used to iterate on the design and improve it.

Applicability to gender/diversity research

Design thinking can be used to draft and introduce a Gender Equality Plan in a university institution by following these steps:

1. Empathize: Understand the current situation of a specific university and the needs of the stakeholders involved. This includes conducting research within the institution and gathering insights from students, faculty, staff and administrators to understand the current state of gender equality at the university. This research may include interviews, online surveys, focus groups, and other methods to gather data on the experiences and perceptions of different groups.

2. Define: Clearly articulate the problem and identify key opportunities for improvement in line with official bodies. This step will help define the scope of the Gender Equality Plan and to identify specific areas where the university needs to focus its efforts. This can include issues such as the underrepresentation of a gender in certain fields of study or the lack of support for working parental figures whilst studying at a university.

3. Ideate: Generate a wide range of ideas. This step will involve brainstorming and other creative techniques to generate a variety of possible solutions to the identified problems. This can include ideas for policies, programmes and initiatives that can support gender equality at the university.

4. Prototype: Create a draft of the Gender Equality Plan. This step will involve taking the best ideas generated and creating a draft plan that the university will take to promote gender equality.

5. Test: Gather feedback on the draft Gender Equality Plan within the institution and stakeholders and use it to inform further development.

Applicability to gender/diversity research

Design thinking ensures a comprehensive and user-centered development of the Gender Equality Plan at the university. Involving stakeholders fosters commitment and support, essential for the plan's success in promoting gender equality.

References

- *Design Thinking for Educators* [IDEO] [Online]
Available at: https://www.ideo.com/post/design-thinking-for-educators [Accessed: 20 June 2023]

- Harvard Business Review [HBR] [Online]
Available at: https://hbr.org/topic/design-thinking [Accessed: 14 Feb 2023]

- Stanford d.school [Online]
Available at: https://dschool.stanford.edu/resources [Accessed: 14 Feb 2023]

3.8 RESEARCH WALK METHOD – *Jolanta Klimczak*

Introduction

A research walk is a qualitative method that combines participant observation and interviews. It is a valuable tool for researchers in various fields, especially those interested in studying the everyday experiences of individuals in their natural environment.

Features

The method is used to study social and individual perception and use of space from the perspective of ethnography, anthropology, sociology, or social geography. So far, it is sometimes used to study how space is perceived and valorised, how space is tamed and what meaning is given to it; how space is used, what social practices are associated with one space or another; how space is built into individual biography, how space builds into social memory.

RWM make it possible to see elements of space that are relevant from the point of view of representatives of different social categories and to discover differences in the experience of space due to class structure or gender (O'Neill, Roberts, 2020, pp. 9-10). The perspective of the subjects is crucial for the researcher: during the process, associations, meanings, and emotions are activated in the subjects, resulting from previous experiences, and they are the

source of valorising a given space and establishing meaningful places. On the other hand, researchers learn to look at the area via someone else's perseption.

Procedure

The number of research walks and the accompanying activities depend on the research objective; no less, it can be assumed that each walk is audiovisual, recorded and used to interview research participants. At the same time, the researcher conducts participatory observation, the results of which are written down and reported each time. As a result, the research walk combines two methods: the classic interview and observation, with several additional advantages: in addition to the dictaphone and camera, as recorders of the process, the functions of a specific writer – especially of sensory experiences – are performed by the body of the respondent and the researcher; an active role is played by the investigated place itself (with its smells, light and colour, temperature, and noise), which further stimulates the exchange of opinions, memories, and ideas, and expands the context; the research walk makes it possible to verbalize what previously seemed impossible to verbalize (Nóżka and Martini, 2015, pp. 44-49).

Various tools can accompany a research walk. One is a mental map, i.e., a picture drawn by the research participants of a given space: a city, a neighbourhood, a college town, a park, campus, etc. When drawing the map, participants are guided by (indicated by K. Lynch) five categories for analysing a given place: path (i.e., the roads you walk and which, according to you, connect particular objects in space), edge (i.e., the boundary where a settlement, park, college town, for example, ends, in the form of a street, building, sports field, etc.), node (i.e., places where different elements and functions meet, where people gather for different purposes), area (i.e., some region in the drawn area, which has, for example, is bypassed or is used for recreation), landmark (i.e., a landmark, distinguished by its form, size, history, with which most people associate). A research walk can use mental maps to explore and verify images (and stereotypes) of social spaces produced by research participants and identify places significant to the people or social groups studied.

References

- Kusenbach M., (2003). *Street phenomenology: The go-along as ethnographic research tool*, Ethnography. 4(3), 455-485
https://doi.org/10.1177/146613810343007

• O'Neill, M., Roberts, B., (2020). *Walking Methods: Research on the Move*, NY: Routledge.

• Nóżka M., Martini N., (2015). *Metody mobilne i wizualne w praktyce badawczej. Zastosowanie fotospaceru w socjologicznych badaniach map mentalnych i zachowań terytorialnych ludzi. Przegląd Socjologii Jakościowej*. t. 11, n. 4, s. 34-50 www.przegladsocjologiijakosciowej.org

Recommended Resources

• https://doi.org/10.1016/j.geoforum.2020.06.002

• Kabk Lectorate Design, *Walking a research method in art and design*, https://issuu.com/kabk/docs/kabk_designlectorate_walkingpublication

• Lynch, K., (1960) *Image of The City* https://www.scribd.com/document/326253949/Kevin- Lynch-Image-of-the-City-1960-pdf#

3.9 MAPPING EXERCISES – *Roderick Vassallo*

Mapping exercises are a method used to visually represent the relationships between different components of a system or a process. The goal of these exercises is to identify connections and dependencies between elements or parts, as well as potential areas for improvement or optimization. One method for conducting mapping exercises is to begin by identifying the key elements of the system or process being investigated. These elements can be represented pictorially using symbols or icons, and they are typically arranged on a large sheet of paper, a whiteboard, or a digital space. Once the elements have been identified, lines or arrows can be used to connect them and indicate the relationships between them. Some examples of mapping exercises include:

Process Mapping: This is a method used to visually represent the steps and activities involved in a specific process or workflow. It allows stakeholders to identify bottlenecks, flow problems, and areas of waste or unproductivity. This is done in order to create a shared understanding of the process among team members and stakeholders.

Mind Mapping: This is a method used to organize and represent ideas, principles, and concepts. A central idea is placed in the centre of the map,

with related ideas branching out from it. This can be used for brainstorming and idea generation, as well as for organizing and structuring information for a project, a presentation, or an assignment.

SWOT Analysis: This is a method used to evaluate the strengths, weaknesses, opportunities, and threats of a business, project, or organization. It allows stakeholders to identify internal and external factors that may impact the success of the organization and to develop strategies to address them.

Value Stream Mapping: This is a method used to map out the flow of materials and information in a manufacturing or production process. The goal is to identify areas where waste or inefficiency occurs, and to create a visual representation of the process that can be used to make improvements.

In these examples, the mapping exercises are used to identify the flow of materials, information, and ideas through a system, and to identify areas of inefficiency or opportunity. It allows stakeholders to identify bottlenecks, flow problems, and areas of unproductivity. It is also a useful tool for creating a shared understanding of a system or process among team members and stakeholders. Furthermore, mapping exercises may be used to identify opportunities for process improvement, cost reduction, and increased efficiency.

Mapping exercises may be used to draft and introduce a Gender Equality Plan in a university by visually representing the current state of gender equality within the institution and identifying areas for improvement.

One approach could be to start by identifying key elements of the institution that are related to gender equality, such as recruitment and hiring practices, staff development and promotion, and campus culture and environment. These elements may be represented by symbols or icons using a physical (sheet or whiteboard) or virtual space.

Next, lines or arrows can be used to connect the elements and indicate the relationships between them. For example, recruitment and hiring practices may be connected to employee development and promotion, which in turn may be connected to campus culture and environment. This will allow stakeholders to see how different elements of the institution are connected and how they may impact gender equality.

Once the current state of gender equality within the institution has been mapped out, the next step would be to identify areas for improvement. This could be done by highlighting areas on the map where there are gaps, issues, or problems, or by identifying areas where the relationships between elements are not as strong as they should be.

The information gathered from the mapping exercise can then be used to draft a Gender Equality Plan that addresses the identified areas for improvement. The plan may include specific actions and initiatives aimed at improving recruitment and hiring practices, employee development and promotion, and campus culture and environment.

Finally, the Gender Equality Plan may be shared and discussed with the relevant stakeholders and implemented in the university institution. The mapping exercise can also be used as a tool for monitoring and evaluating the progress of the Gender Equality Plan over time.

It is worth mentioning that Gender Equality Plans are not a one-time effort but an ongoing process. Therefore, the mapping exercise should be repeated on a regular basis to ensure that the university institution is continuously working towards gender equality.

References

- IDEO website includes several articles on mapping exercises, including how to use them in design thinking and how to lead effective mapping sessions: https://www.ideo.com/topic/mapping.

- *The Design Thinking Playbook*: https://designthinkingplaybook.com/mapping.

- *A Guide to Mind Mapping*: https://www.mindtools.com/pages/article/newTMM_01.htm.

- The Noun Project: https://thenounproject.com/

3.10 PARTICIPATORY ACTION RESEARCH – *Jolanta Klimczak*

Introduction

Participatory Action Research (PAR) is an internally differentiated methodological approach that involves various methods of diagnosis, analysis, monitoring and evaluation of multiple deficiencies or problems in organisations and social institutions.

The term "action research" was coined in the 1940s by Kurt Lewin, a German-American social psychologist widely considered the founder of this field. In 1946, he published "Action Research and Minority Problems", drawing attention to the potential of scientific knowledge, combined with the involvement and action of local communities and members of marginalised social groups, to

solve social problems and transform living conditions. PAR gained popularity in the 1970s thanks to the critical educator Paolo Freire, who, where in his pedagogy of the oppressed project, promoted the inclusion of communities in solving their pressing problems by developing critical awareness of the causes, conditions, and consequences of the current position in the social hierarchy of groups and communities. The concept of "participatory action research" was introduced to scientific discourse by Colombian sociologist Fals-Borda. He saw participatory action research as a specific methodology to empower excluded groups, offering theoretical and empirical tools to exert pressure through social projects, actions, or struggles (Brzozowska-Brywczyńska 2019, p. 93).

Features

PAR is a democratic research process because it presupposes the participation of all participants in the research process; fair because it presupposes the equivalence of participants' different contributions to developing local, practical knowledge; and emancipatory because it presupposes action to overcome inequality, marginalisation, and oppression.

It has applications in educational, academic, and community work, helping educators, researchers, and social activists to quickly prepare solutions and proposals for change expected in each place and time due to the deficiencies discovered. PAR can also design and organise educational, scientific, or other processes to improve various functions and activities, not just compensate for weaknesses. PAR is highly adaptable, allowing researchers to tailor the analysis to their needs and make practical changes at the individual level. It provides a direct and applicable path to solving entrenched problems rather than suggesting complicated ones. It offers a high level of practical application of research. Properly conducted action research can empower participants, inform social change, and enable them to make meaningful community changes. Both qualitative and quantitative methods can be used. PAR has limited generalisability due to its flexible nature. It often needs to be seen as being theoretically rigorous. Action research can be ethically complicated, as participants may feel pressured to participate or to participate in a certain way. The PAR study has a high risk of biases, such as selection bias, social desirability bias, or cognitive bias. Difficulties may arise in distinguishing between action and research, and delays in implementing action research due to various reasons that are difficult for researchers to control are standard.

Procedure

A focus on participatory research methods is essential for knowledge creation on the one hand and for democratic collaboration on the other. It allows researchers to penetrate deep layers of collective wisdom and mechanisms of community functioning and provides stakeholders with the skills to act effectively and implement change.

Stages of the research process (Mertler, 2006, p. 14):

1. Building and developing research partnerships relationships, assessing, and maintaining partnerships;
2. Developing research questions and planning a research project;
3. Assessment of community needs, resources, and priorities; collecting data and generating ideas;
4. Data analysis, data interpretation;
5. Dissemination of results;
6. Driving change, sharing the impact and results of the project at the policy level.

What makes it unique and special is its shared pursuit of knowledge and research objectives beyond science's traditional (positivist) goal – to generate knowledge – to change social reality. PAR is based on research methods and tools that can be used in a participatory way. The involvement of participants is the foundation of the relationship already at the needs assessment stage and the formulation of research objectives. Also, in the subsequent phases of the research process, stakeholders choose the tools and methods that best represent their interests and maximise the potential for genuine impact. Of course, research tools and techniques may vary in their level of participation. However, even traditional methods such as FGIs can be participative if stakeholders are appropriately involved in the research process. The same will be valid for surveys involving the local community or for preparing an interview questionnaire for which stakeholders will propose questions. Any research method or tool can be participatory if selected and used in collaboration between academic and community partners.

Applicability to gender/diversity research

Researchers implement PAR in an environment struggling with negative phenomena that need correction and where reform is desired. It does not require them to involve impartial researchers or outside observers. The PAR method needs to be more formal, and fidelity to research procedures

is less critical than solving practical problems in a specific environment and formulating answers to specific questions (such as about high student absenteeism rates or new academic support strategies). Thus, the research and knowledge that PAR focuses on concerns a limited environment. However, this does not mean that the solutions adopted, and the analysis of social processes cannot be applied to another organisation or environment. This depends on various factors. Neither reproducibility nor universality of results, no less, is a necessary condition for the validity of the PAR method. PAR is a widely employed research method for minority, marginalised, and discriminated groups, including studies on women's experiences. It offers new perspectives on describing and comprehending the challenges, constraints, and prospects facing women who have experienced violence, refugeeism, and homelessness. It encourages the use of expert and local knowledge to rebuild their living conditions and foster empowerment. Feminist PAR (FPAR) empowers women to address gender and other intersecting inequalities. It pays attention to the struggle for true collaboration among stakeholders who are brought together to represent widely disparate viewpoints and are backed by different levels of personal and institutional power (Johnson & Flynn, 2020).

References

• Brzozowska-Brywczyńska, M., (2019). *Badania partycypacyjne w działaniu* (PAR): *między produkcją wiedzy a społecznym zaangażowaniem*, [*Participatory Research in Action (PAR): between knowledge production and public engagement*] Rozwój Regionalny i Polityka Regionalna 46: 91–101.

• Harvey, H., Pierce, J., & Hirshberg, D., (2020). *Participatory research methods choice points in the research process*. https://jprm.scholasticahq.com/article/13244-participatory-research-methods-choice-points-in-the-research-process

• Mertler, C. A., (2006). *Action Research: Teachers as Researchers in the Classroom*. Thousand Oaks, CA: Sage Publications.

• Tegan, G.,(2023). *What Is Action Research? Definition & Examples*, 27.01 https://www.scribbr.com/methodology/action-research/

Recommended Resources

• Johnson, H., & Flynn, C. (2020). *Collaboration for Improving Social Work Practice: The Promise of Feminist Participatory Action Research.* Journal of Women and Social Work, 1-19.
https://constellation.uqac.ca/id/eprint/5849/1/0886109920954424.pdf

• Reason P., & Bradbury, H. (2008). (ed.) *Action Research Participative Inquiry and Practice*, Sage Publications. https://ikhsanaira.files.wordpress.com/2016/09/action-research-participative-inquiry-and-practice-reasonbradburry.pdf

• Vaughn, L. M., & Jacquez, F. (2020). *Participatory research methods - choice points in the research process*. Journal of Participatory Research Methods, 1(1)
https://doi.org/10.35844/001c.13244

3.11 PHOTOVOICE – *Ewa Jarosz*

Introduction

The Photovoice method involves the use of photography to obtain information about perceptions of various problems, phenomena and situations from people representing specific groups and environments and as a means of stimulating their reflections on the possibilities for change and action toward a given reality (Wang & Burris, 1994). Photovoice assumes that people participating in the research capture on their own, in photographs, the most important aspects of their lives that concern them personally or the groups or communities to which they belong. Through Photovoice individuals receive cameras to take pictures that represent important aspects of their lives and communities. They record natural or arranged situations and objects that express their problems, their life situation, their understanding of ideas or phenomena and then comment on their photographs, and consider how they depict their situation and problems and then consider ways to change their situation (Delgado, 2015, p. 8), so they are active subjects in generating an image of their community, and subsequently, become advocates for it, as well as agents of change (Wang et al. ,1998: Griebling et al., 2013).

Features

The creators of the method Mary Ann Burris and Caroline C. Wang (1994, 1997) emphasized that the use of the tool of photography placed in the hands of ordinary people, non-professional photographers and "non-researchers"

creates the possibility of obtaining images of places, moments or meanings that otherwise would never have had a chance to be created and would never have been available to researchers. It creates an opportunity to capture what happens in a community, group, or individual's life. Photovoice allows one to "touch" what is "intangible," such as inequality, discrimination, conflict, and frustration (Böök & Mykkänen, 2014).

Photovoice is used mainly in research as a method in the qualitative approach. It might be used for collective entities, i.e., groups or communities, but also in an individual context. In its methodological basis, Photovoice is derived from content analysis and ethnomethodology. In its detailed characteristics, it is based on the methodological trend of visual research (Banks, 2007) and the use of documentary photography and photographic social reportage, whose domain is the visual documentation of severe social problems, such as violence, poverty, discrimination, humiliation, and the like (Böök & Mykkänen 2014).

Photovoice is a research method based on a participatory approach to get knowledge about a community or a group and to make a change (Griebling et al., 2013). The method is used to learn about problems and stimulate social or emancipatory action through an essential element of its application: a joint discussion among participants to generate themes, name problems, clarify group meanings, and generate ideas for possible actions (Wang et al. 1998). Caroline Wang, the creator of the method, defined its essence as a process by which people identify, represent, and empower their community and catalyse change in it through the use of photographic techniques (Wang and Burris, 1997) and located it in the category of participatory action research, as bringing direct change, benefits in the lives of communities, groups, individuals (Clements, 2012; Wang, 2006).

Photovoice is primarily used for research whose ultimate goal is to act on reality – socially engaged research. It is a method addressed to those studies and researchers whose final intention is to create awareness of a social problem and be a catalyst for change (Griebling et al., 2013). It is dedicated primarily to studying communities, groups, and communities in difficult situations, experiencing specific problems, being disadvantaged, or being discriminated. Examples of research with this method have shown its high value in learning about the life situation of many groups and the various problems affecting them (Griebling et al., 2013). They are conducted with children and adolescents, with women, with members of discriminated or excluded communities, with

people with disabilities and their families, and with people with specific mental health problems, among others. Its application around the world has an interdisciplinary dimension. Researchers from different disciplines use it to study various problems, i.e., health, cultural, socio-religious, ethnic, social, civic participation, social discrimination, and others.

Procedure

The stages of the Photovoice method can be summed up into five main methodological categories of the research process (Griebling et al., 2013):

Identification of the issue or question proposed to be photographed;

Training of participants in photography, taking and selecting photographs;

Critical-reflective discussion of selected photographs;

Construction of a shared story or experience of those representing the community; and,

Communicating/sharing the reportage with decision-makers (authorities, management).

The classical use of the Photovoice assumes implementing several steps in sequence, which are (Wang 2006):

1. Selection of influential people to whom the message will be addressed – the results of the method;

2. Selection of representatives of communities or groups with the assumption that, ideally, the target group consists of about seven to ten people;

3. Familiarization of representative people with the methodology of the action and with aspects of the photographic workshop and ethical aspects of photography (such as, obtaining the consent of the people who will be photographed);

4. Presenting the initial subject matter that the photographs will cover and possibly setting guiding themes;

5. Allotting adequate time to take the photographs and analysing the presented subject matter;

6. Joint discussion and discussion of the prepared photographs so that the target people answer specific questions.

In applying the method, questions that stimulate critical-reflective discussion are crucial. In a classic survey, these are formulated sequentially and most often as follows (Griebling et al. 2013):

– What is depicted in the photograph?
– Why was it photographed?

– What is happening in the photograph? What does it express?
– How does it relate to our everyday life?
– What does the photograph say about your/our life?
– Why is this situation or issue happening?
– Why is it important to understand this issue? What does this give you?

What can/can we do about it? How can this photo help us improve our lives concerning our problems?

Keeping in mind the meaning and purpose of the method, other questions to stimulate discussion and contributions from participants might be used.

Applicability to gender/diversity research

Photovoice fits perfectly research on problems of equality and diversity, including in academic settings. It is an effective way of identifying and defining the problems of people who have and feel little influence over decisions and policies affecting their life, career, and community, especially for women, children, and other various minority groups (Wang 1999).

Today, Photovoice is treated as a research method and a tool for developing social participation, emancipation, and social empowerment. So, the method perfectly suits gender and diversity research. Moreover, it is rooted in the feminist tenet the believes that marginalized groups should be socially empowered so that they can play a more active part in studying their reality (Cornel et al., 2019).

In literature, Photovoice is also referred to as a feminist ethnographic method (Bell, 2015). It was first used as a research method by Mary Ann Burris and Caroline C. Wang to assess the needs of rural women and organize a joint discussion with them about their health problems. This research was used by the Ford Foundation's 1992 program to support the reproductive health and development of rural women in Yunnan Province, China (Wang & Burris 1994; Wang et al., 1998). Another example of the use of Photovoice is the projects carried out by Darlene Clover (2006) in Canada, where it was conducted among women and children from vulnerable backgrounds to identify their potential to change their situation and empower them. The other Clover project was conducted with women with serious social and health problems. There are many examples of Photovoice to explore the various problems of women (e.g., Tobin et al., 2023; Macdonald et al., 2022).

Considering Photovoice as a valuable method of gender and diversity research, its connection with the concept of Paulo Freire should be mentioned.

Freire (2000) believed that by participating in group activities and attempting to dialogue with people on issues related to the problems of their community, people could achieve the ability to analyse their situation critically and consequently develop their emancipatory and participatory competencies needed to change their situation and the actual opportunity to shape their own lives (Carlson et al., 2006). This makes Photovoice not only a method of cognition but also an opportunity for reflection, critical thinking, and an effective way of social education.

References

• Banks, M. (2007). *Using Visual Data in Qualitative Research*. SAGE Publication Ltd. ISBN 9780857020260

• Bell, S. E. (2015). *Bridging activism and the academy: Exposing environmental injustices through the feminist ethnographic method of photovoice*. Human Ecology Review, 21(1), 27- 58.
https://search.informit.org/doi/10.3316/informit.325201265995817

• Böök M.L. & Mykkänen J. (2014), *Photo-narrative processes with children and young people*, International Journal of Child, Youth, and Family Studies, 5(4.1), 611–628.

• Carlson, E. D., Engebretson, J., & Chamberlain, R. M. (2006). *Photovoice as social process of critical consciousness*. Qualitative Health Research, 16(6), 836–852. https://doi:10.1177/1049732306287525

• Clements, K. (2012). *Participatory action research and photovoice in a psychiatric nursing clubhouse collaboration exploring recovery narrative*, Journal of Psychiatric and Mental Health Nursing, 19(9), 785–91.

• Clover, D. E. (2006). *Out of the Dark Room: Participatory Photography as a Critical, Imaginative and Public Aesthetic Practice of Transformative Education*. Journal of Transformative Education, 4(3), 275–290.
https://doi.org/10.1177/1541344606287782

• Cornell, J., Mkhize, L. & Kessi, S. (2019). *Envisioning Photovoice as Decolonial Feminist Praxis*. In: Boonzaier, F., van Niekerk, T. (eds) Decolonial Feminist Community Psychology. Community Psychology. Springer, Cham.
https://doi.org/10.1007/978-3-030-20001-5_5

• Delgado, M. (2015). *Urban youth and Photovoice; Visual ethnography in action*, OUP Oxford University Press, Oxford.

• Freire, P. (2000). *Pedagogy of the oppressed*, 30 Anniversary Edition, Continuum Publishing, New York–London.

• Griebling S., Vaughn L., Howell B., Ramstetter C. & Dole D. (2013). *From passive to active voice: Using photography as a catalyst for social action*, International Journal of Humanities and Social Science, Vol. 3, nr 2, 16–28.

• Macdonald D., Peacock K., Dew A., R.K., Fisher K. & Boydell K.M. (2022). *Photovoice as a platform for empowerment of women with disability*. SSM - Qualitative Research in Health, Volume 2, 2022, 100052, ISSN 2667-3215, https://doi.org/10.1016/j.ssmqr.2022.100052.

• Tobin, M.M., Jones, T.L., Ho, Y.S.H. & Short C.E. (2023). *Using photovoice to explore young women's experiences of behaviour change techniques in physical activity mobile apps*. International Journal of Behavioral Nutrition and Physical Activity 20, 43. https://doi.org/10.1186/s12966-023-01447-9

• Wang C. & Burris M.A. (1994). *Empowerment through Photo Novella: Portraits of Participation*, Health Education & Behavior, 21(2), 171–186.

• Wang C. & Burris M.A. (1997). *Photovoice: Concept, Methodology, and Use for Participatory Needs Assessment*, Health Education & Behavior, 24(3), 369–387.

• Wang, C.C., Yi W.K., Tao Z.W. & Carovano, K. (1998). *Photovoice as a Participatory Health Promotion Strategy*, Health Promotion International, (13)1, 75-86, https://doi.org/10.1093/heapro/13.1.75

• Wang, C.C. (1999). *Photovoice: a participatory action research strategy applied to women's health*. Journal of Women's Health. 8(2):185-92. doi: 10.1089/jwh.1999.8.185. PMID: 10100132

• Wang, C.C. (2006). *Youth Participation in Photovoice as a Strategy for Community Change*. Journal of Community Practice 14(1-2):147-161; DOI: 10.1300/J125v14n01_09

Recommended Resources

• *A practical guide to Photovoice*. (2009) https://rpay.link/guide/pdf20.pdf

• Jaridorn M. (2019). *Photovoice Handbook for Social Workers. Method,*

Practicalities and Possibilities for Social Change. Palgrave Macmillan.
https://doi.org/10.1007/978-3-319- 94511-8

- Photovoice manual. (2014).
https://www.researchgate.net/publication/314838381_Photovoice_Manual

- *The Photovoice Manual. A guide to designing and running participatory photography Projects*.
https://eclass.hmu.gr/modules/document/file.php/YK128/PV_Manual.pdf

3.12 LEGAL RESEARCH METHODS – *Edit Kriston*

Legal research methods exist in several forms and have more unique specialties compared to research methodologies in other disciplines. The first and most important feature is that we can distinguish between two major forms of legal systems.

First is the common law legal system. The word "common law" arises from the history of the countries under English authority and it is originally based on the law created by the Royal Courts of England, i.e., case law. The peculiarity of this legal culture is that it recognises the importance of legal experience, especially judicial experience, and legal interpretation is not based on codexes or written laws, but it is primarily based on the similarity of cases occurring in court case law (Kelemen, 2018).

In contrast, the other major form is the continental legal systems, which are based on a coherent system of codexes and rules based on a long historical development, and creates the base of judicial interpretation. Accordingly, the techniques that form the essence of this methodological guide have developed primarily in continental legal systems (Helmholz, 1990).

One of the defining methods of legal research is dogmatic analysis, which primarily involves exploring the content of concepts and textual analysis, and then interpreting them to a unique life situation. The peculiarity of legal dogmatic research is that it mainly provides information for professionals since it is based on the special language of law and its specific grammatical semantic interpretation. In this method, terms and definitions have a special legal meaning other than ordinary ones which helps to resolve the problem of legal interpretation specifically based on their meaning in the legal profession. During the use of dogmatic research, it is necessary to examine

the entire legal development, therefore, the application of the method is often intertwined with the application of the historical method of the law.

The historical method seeks to examine the historical background of legal development and makes conclusions from possible directions of legal development to facilitate the interpretation of existing legal provisions. The advantage of this research method is that social changes and the legal tracking of them and processes taking place in society are sufficiently transparent. Legal historical analysis can be carried out at the national level, examining the development of the national legal system, but also in an international context, where the development of legal history can be examined globally. In this context, we should make mention of the use of the teleological method, which can reveal the meaning of the legal norm based on its social purpose, primarily answering the question of the purpose for which a given legal norm was created and what function it is intended to fulfil. There is some typical area of law, for example, private law, which is less tolerant of the intervention of legislation, therefore, the legal rules are short and regulate only the necessary life situations of the parties and let them free to arrange their legal problems their way. However, this leads to the interpretation difficulty of legal provisions that are less detailed and less adapted to individual life situations.

The teleological interpretation, concluding the analysis of the name and introductory provisions of the norms, can remedy this problematic point of interpretation. However, the teleological method should not be confused with the substantive method. The substantive method of interpretation is primarily based on the judgment of society – outside the law. This social judgment can be primarily the examination of moral principles, considerations of justice, and economic aspects.

The next form of research methods is legal comparison, during which scientists examine the relationship between the regulations appearing between states on the one hand and at the supranational level on the other, as well as the possible alternative of certain legal solutions as good practice to create an effective solution to the legal question arising as a problem (Tóth, 2016).

References

• Kelemen, Katalin (2018): *A common law jogrendszerek*. In: Jakab, András - Fekete, Balázs (eds.): Internetes Jogtudományi Enciklopédia (IJOTEN) In: https://ijoten.hu/szocikk/a-common-law-jogrendszerek

• R.H. Helmholz (1990): *Continental law and common law: Historical strangers or Companions?* Duke Law Journal Vol. 6. pp. 1208-1209.

• Tóth, J. Zoltán (2016): *A dogmatikai és jogirodalmi értelmezés a magyar felsőbírósági gyakorlatban*. In: Bódig, Mátyás-Zódi, Zsolt (eds.): *A jogtudomány helye, szerepe és haszna. Magyar Tudományos Akadémia Társadalomtudományi Kutatóközpont Jogtudomány Intézete - Opten Informatikai Kft*, Budapest, pp.225-231.

3.13 FEMINIST INSTITUTIONALIST THEORY – *JosAnn Cutajar*

Institutions are embedded in particular societal contexts (O'Mullane, 2021) and context has an impact on the policies created and the way they are implemented. At the same time, such organisations have their own ethos, promoted through written and codified rules that are designed and implemented institutionally. These tend to prescribe and proscribe 'acceptable' forms of behaviour. These 'ruling relations', in turn, help to produce outcomes which help re-produce broader social and political gender expectations. Apart from the formal norms, rules and conventions though, there are also the informal ones. Informal policies or norms are not always taken into consideration by other theories which study gendered practices since they are often taken for granted as standard behaviour (Clavero & Galligan, 2020). Both informal and formal norms, rules and conventions help to constrain or enable the behaviour of social actors working inside and outside of said institutions (Holmes, 2020). Like the formal, informal conventions, norms and practices can help determine and legitimize certain forms of behaviour. Informal rules, norms and conventions, can also help undermine the efficacy of formal ones.

Institutional theory has been used by feminist researchers to study institutional dynamics and find whether they are gendered, and in what manner by taking into consideration both informal and formal rules, norms, and conventions (Kenny, 2014). The theory enables researchers to find out how gender norms function within institutions and how institutional strategic processes tend to maintain gender inequality if these are not challenged. It shows how researchers can find out whether there are any gendered patterns in institutions, how such patterns are created and, in turn, retain gendered power forces. The central motive of a feminist institutionalist approach is to focus on relations between gender, power, and continuity, but the ultimate goal is to bring about change at the institutional level. It

studies gender roles and how these influence power relations and social interactions. This theory strives to influence the basic structure of gendered institutional issues and contributes to an understanding on how institutions can be re-gendered.

One of the issues that this theory focuses on is gender representation at decision-making levels. Due to the fact that decision-making bodies are predominantly made up of men, certain policies might not be introduced or implemented because women's viewpoints may not make it onto institutional agendas. To ensure that the policies, measures, norms, and values in place in an institution are not discriminatory – directly and indirectly – it promotes diversity at decision-making level. Diversity among decision makers can lead to more inclusion, with the ultimate goal being substantive change in a given organisation (Thomson, 2018).

This theory provides a theorised style of observing a social organisation with the ultimate goal of exposing how social relations have an impact on specific events, and how certain experiences shape the given social relations (Montigny, 2017). People are embedded in particular institutions, and these institutions have an impact on how they act. This theory is, therefore, helpful when it comes to reviewing systematic and operational power relations and exploring ways to enable social change (Hampton, 2017). The focus is on the standpoint of individuals working in given contexts, giving these the opportunity to reflect on how ruling relations and social interaction impact on their ordinary lives within and outside said institutions.

To understand the standpoint of individuals embedded in particular institutions, the researcher needs to investigate the material practices and relations anchored in institutional reality. This refers to work activities and relationships as well as the institutional processes that shape experiences. This theory recognises that those involved in a particular institution are impacted by social but also institutional norms and values (Klostermann, 2019). Both need to be factored in the analysis.

Undertaking and categorising formal and informal rules, norms and conventions and assessing their capacity in enabling institutional change towards gender equality, can prove to be methodological challenges.

References

• Clavero, S., & Galligan, Y. (2020, March 12). *Analysing Gender and*

Institutional Change in Academia: Evaluating the Utility of Feminist Institutionalist Approaches. Journal of Higher Education Policy and Management, 1-17. DOI: 10.1080/1360080X.2020.1733736

• Hampton, R. (2017). *Racialized Social relations in Higher Education: Black Student and Faculty Experiences of a Canadian University*. Montreal: McGill University Libraries.

• Holmes, G. (2020). *Feminist Institutionalism. In United Nations Peace Operations and International Relations Theory*. Edited by Kseniya Oksamytna and John Karlsrud Manchester: Manchester University Press, 2020.

• Kenny, M. (2014). *A Feminist Institutionalist Approach. Politics & Gender*, 10(4), 679-684. DOI:10.1017/S1743923X14000488

• Klostermann, J. (2019). *Investigating the Organizational Everyday: A Critical Feminist Approach*. Culture And Organization, 26(4), 269-283.
Doi: https://doi.org/10.1080/14759551.2019.1576681

• Montigny, G. (2017). *Ethnomethodological Indifference: Just a Passing Phase?* Human Studies, 40(3), 331-364.

• O'Mullane, M. (2021). *Developing a theoretical framework for exploring the institutional responses to the Athena SWAN Charter in higher education institutions-A Feminist institutionalist perspective*. Irish Journal of Sociology, 29(2), 215–235. https://doi.org/10.1177/0791603521995372

• Thomson, J. (2018). *Resisting gendered change: feminist institutionalism and critical actors. International Political Science Review / Revue internationale de science politique*, 39(2), pp. 178-191.

3.14 INTERPRETATIVE PHENOMENOLOGICAL ANALYSIS – *JosAnn Cutajar*

Introduction

Interpretative phenomenological analysis (IPA) is a qualitative approach that provides a detailed examination of research participants' personal lived experience. IPA departs from the premise that researchers need to examine the detailed experience of each case before coming up with general claims. IPA is a particularly useful methodology for examining topics which are complex, ambiguous and emotionally laden.

Features

This research tool maintains that in order to understand how people live in the world, one needs to study both the relationships in which they are involved, as well as the cultural and temporal contexts in which the participants are embedded.

IPA involves two stages of interpretation namely, the researcher trying to make sense of the participant trying to make sense of what is happening to them. In this approach, the researcher has to actively engage in a hermeneutic process by namely reflecting on and putting aside their assumptions and pre-conceptions.

IPA can prove fruitful if the researcher manages to bond with their research participants. When this happens, it gives researchers an opportunity to understand the innermost deliberation of the lived experiences of research participants. In order to understand these experiences from the participants' viewpoint, researchers need to set aside their prejudgments, biases, and preconceived ideas about things being studied via bracketing, and see things from the participants' perspective.

Procedure

Creswell (2012, p. 76) states that "a phenomenological study describes the common meaning for several individuals of their lived experiences of a concept or phenomenon." This can only occur if the interviewers have a high level of skill to make the participants go into detail. It involves a combination of strong empathic engagement and the ability to probe further into interesting and important aspects by paying attention to unspoken cues during the conversation.

In IPA studies, the sample size tends to be small. This facilitates the micro-level reading of the participants' accounts. The participants chosen tend to reflect and represent the homogeneity that exists among the participants' sample pool. The objective of undertaking research with a homogenous group of participants is to get a better understanding of the overall perceptions among the participants' lived experiences. Smith et al. (2009) sustain that "samples are selected purposively (rather than through probability methods) because they can offer a research project insight into a particular experience" (p. 48). The sample is kept small and reasonably homogeneous because this will enable the researcher to examine both convergence and divergence in some detail.

When it comes to studying higher educational institutions or research organisations, IPA can be used to study work relationships, workload, and

perception of the management's support of teaching. It can also be used to evaluate the impact of certain policies on students and staff, such as why staff and students do not report incidents of sexual harassment and bullying; or the effect that bullying or sexual harassment has on their work/study, mental and physical health among others.

As a research tradition, it is interpretative, interpersonal, and interactive in nature. Like any qualitative research approach, it leads to rich data, which is thickly descriptive.

Applicability to gender /diversity research

This method is very versatile and can be used to study different social groups.

References

• Creswell, J. W. (2013). *Qualitative Inquiry and research design choosing among five approaches*, (3rd Ed). Thousand Oaks, CA: Sage Publications.

• Smith JA, Osborn M. (2015). *Interpretative phenomenological analysis as a useful methodology for research on the lived experience of pain*. British Journal of Pain. 9(1):41-2.
doi: 10.1177/2049463714541642. PMID: 26516556; PMCID: PMC4616994.

3.15 SEX-DISAGGREGATED DATA ANALYSIS – *Luna Carpinelli*

Data collection has to do with the concept of measurement, the process by which the data, value or response for the sought-after variable is achieved.

In the process of data collection, measurement is a prerequisite for obtaining scientific knowledge. The data collection instrument is geared towards creating conditions for measurement. Data are concepts that express an abstraction of the real world, of that which is sensory, capable of being perceived through the senses either directly or indirectly. Everything that is empirical is measurable. There is no aspect of reality that escapes this possibility.

Measurement implies quantification.

The relationship is as follows: each variable, which is a concept susceptible to measurement and quantifiable, is attributable to it a value, datum or response in each unit of analysis. This then means that it is possible to formalise reality in a scheme that summarises it, resulting in a data matrix.

Sex-disaggregated analysis is an approach used to examine data and information by gender in order to identify and understand gender inequalities that exist in different contexts. This analysis provides an opportunity to assess the differential impacts that men and women may experience in various sectors, such as education, employment, politics and health.

The methods used in sex-disaggregated analysis may vary depending on the context and the specific objectives of the analysis. However, some common methods are presented below:

Data collection: In order to conduct a sex-disaggregated analysis, it is necessary to collect data that is broken down by gender. This means that the information collected should include separate data for men and women, or at least for males and females. For example, when analysing the employment rate, it is important to have separate data showing the number of men and women employed.

Gender indicators: Several gender-specific indicators are used to assess gender inequalities. These may include labour participation rate, gender wage gap, gender literacy rate, gender political representation, access to economic and social resources, among others. Gender indicators provide quantitative measures to understand the gender situation and gender gap in a given context.

Comparative analysis: Gender-disaggregated analysis often involves a comparison between men and women in various sectors. For example, it might be useful to compare labour participation rates between men and women to identify possible inequalities. This type of comparative analysis makes it possible to detect significant differences and to assess the impact of gender inequalities.

Data synthesis and interpretation: After collecting the data and conducting the analysis, it is important to synthesise and interpret the results in a meaningful way. This may involve presenting graphs, tables, or other visual means to illustrate the gender inequalities identified. Data interpretation may also involve analysing the causes of inequalities and identifying possible solutions.

Sex-disaggregated analysis is an important tool for understanding gender inequalities and guiding the design of policies and interventions aimed at promoting gender equality. It helps to identify areas where inequalities persist and to assess the effectiveness of measures taken to address them.

References

- *European Institute for Gender Equality* (EiGE):
https://eige.europa.eu/gender-mainstreaming/tools-methods/sex-
disaggregated-data#:~:text=Data%20collected%20and%20tabulated%20sepa
rately,requirements%20in%20getting%20gender%20statistics.

CHAPTER 4

WORK-LIFE BALANCE AND ORGANISATIONAL CULTURE
Edit Kriston, Gábor Mélypataki, Bernadett Solymosi Szekeres

INTRODUCTION

The European Union was created primarily for economic purposes and considerations. Therefore, the EU's freedoms also serve mainly to guarantee economic development. It was only much later that the social dimension of the European Union became a major guideline, when it was recognised that economic growth also requires the shaping of social conditions, and that social security is essential for economic development. At the same time, other circumstances have made and continue to make it difficult for the Union to achieve economic development. The European Union is experiencing a general demographic crisis, with ageing societies and a decline in the birth rate in the Member States. With this in mind, the European Union has recognised that if it is to meet its economic growth targets, it must increase the participation of women in the labour market, (Göndör, 2015) especially as gender segregation in the labour market is an important characteristic of employment (Koncz, 2010). The above-mentioned demographic crisis is also pushing policy makers to promote the (re)integration of women into the labour market. This process is not without its difficulties, because although the role of women in the family and in society has changed a lot over the centuries, there are still some characteristics that are very deeply embedded and that are still holding back progress. It is a centuries-old tradition that a woman's place is by the fireplace, her role is to give birth and raise children, and to manage the household.

This family model has been changed by the mass entry of women into the labour market, which has led to the emergence of two-income families (Tünde, 2018). In most European countries, women's activity rates have increased year

by year since the 1970s, though from different starting levels and at different paces. This steady growth was not halted by the impact of the global economic crisis in 2008-2009 (Szabó-Morvai, 2017). As activity rates have converged, employment rates for men and women have also converged in recent decades. However, there are significant differences in, for example, employment patterns. In 2017, 31.3% of women aged between 20 and 64 in the EU28 worked part-time, compared to only 8.2% of men (Szabó-Morvai, 2017). The statistics, therefore, show that there is a clear difference in the situation of workers of different genders.

Overall, the European Union is paying particular attention to reducing gender segregation in order to improve the social situation of women, (Koncz, 2010) an important part of which is reducing labour market disparities. This segregation is manifested in several ways, the most striking feature being the segregation of sectors, occupations and jobs by gender, (Koncz, 2010). Moreover, the reproduction of segregation is ensured by the interaction between the occupational orientation of the genders and occupational segregation. (Koncz, 2010). Therefore, the emergence of gender differences in the labour market does not start at the employment stage, but an early form of gender segregation can be observed already in the process of career choice and the acquisition of social patterns. International comparative analyses show that gender segregation in the labour market is present and stable in every country in the world. (Koncz, 2010). However, it should be noted that the literature on gender segregation in the labour market, and consequently the related national and EU policies, focus mainly on the occupational/sectoral segregation of women. Thus, this study can also focus on this issue (Koncz, 2010).

The European Union pays special and increasing attention to the mitigation of gender segregation in the last decade, as it sees this as a way to improve the position of women in the labour market and as a key instrument to eliminate gender pay gaps (Koncz, 2010). However, in this context, the problem that the difficulties of balancing paid work and family life significantly limit women's participation in the labour market, has also been brought to the fore. To address this, EU policy has given more and more importance to increasing flexibility at work and to implementing the principle of equal treatment in practice. In fact, the aim behind the drive to develop family-friendly workplace policies is twofold: to combat poverty and social exclusion, and to increase productivity and economic competitiveness according to the literature (Göndör, 2015).

The European Commission has expressed on several occasions the need to resolve the conflict between work and family life for women and men. Although these resolutions are addressed to both genders, in reality the legislation is based on the traditional principle of the division of labour within the family (Göndör, 2015). However, this entails a number of risks. Göndör highlights that while maintaining traditional family models, the inclusion of women in the labour market does not reduce inequalities in the home and may even result in women having to carry the double burden of having to manage both work and family responsibilities (Göndör, 2015). A further critique is that, fundamentally, the measures and documents are based on both traditional family models and on male and female gender. This is also expressed in the report published by the European Commission: in the context of work-life balance measures and policies, it can be seen that as policy is formulated and positioned towards the traditional nuclear family, the access that other, less traditional family types have to such leave is under-explored[11]. This is also harmful because real change can only result from accepting the principle of gender-neutral parenthood in practice, and from making it natural that the upbringing of children is the equal task and responsibility of both parents (Göndör, 2015).

We share the position in the literature that the relationship between work and private life is not only about the need to reconcile work and family life, but also about data protection or even lifelong learning, development of employees, etc. At the same time, it would be impossible to achieve work-life balance without taking into account the specific characteristics of labour law, such as leave or flexible working hours, which are linked to the status of parent or carer, since it is essentially this type of instrument which (also) takes the issue into the field of labour law. To put it another way, without strengthening labour and social law measures to support parents, and, in particular, female parents, on the one hand, work-life balance would be impossible to achieve and, on the other, women would suffer serious disadvantages on the labour market (Sipka & Zaccaria, 2020). This position

---

[11] Only a minority of Member States allow the partner of a parent to take parental leave to look after a child with whom they have no legal relationship. As same-sex couples' access to different types of family leave depends almost entirely on their legal rights to become parents, this too is developing unevenly across Member States. These divergences result in different parental care provisions being available to children depending on the type of families and the Member State in which they grow up (Picken & Janta, 2019).

is reflected in the following historical overview of the EU's legislative process to promote work-life balance, in which the different sources of legislation mainly concern the roles, rights and obligations of female and male workers and employers.

In the field of equal treatment, the legislative process has been mainly launched from 1975 onwards, as a result of the first Social Action Programme, since the prohibition of gender discrimination is treated as a fundamentally social issue in Community law. Community law first applied the prohibition of gender discrimination only to equal pay, and later extended it to general terms and conditions of employment and social security systems (Göndör, 2015). Among the secondary legislation on this subject, Directive 76/207/EEC, which extended the principle of equal treatment for men and women beyond equal pay to access to employment, vocational training and promotion and working conditions, is highlighted. Although the law expired on 15 August 2009, it is nevertheless of great importance. It is important to note that the European Court of Justice has developed an extensive case law regarding the provisions of the Directive. Article 2 Paragraph 1 of the Directive lays down the following with erga omnes effect: "For the purposes of the following provisions, the principle of equal treatment shall mean that there shall be no discrimination whatsover on grounds of sex either directly or indirectly by reference, in particular, to marital or family status." However, the Directive also provides that its rules do not affect the provisions on the protection of women, in particular, as regards pregnancy and maternity. "Under the Directive, the application of the principle of equal treatment means that there must be no gender discrimination in the conditions of access to employment, including selection, irrespective of the field of activity or economic sector or the level of the employment hierarchy" (Göndör, 2015). "The Directive was later amended by Directive 2002/73/EC, which added new provisions taking into account the principles developed in the case law of the European Court of Justice" (Göndör, 2015). It is worth highlighting that there are a number of cases based on this directive which concern differences between women and men in the workplace. In this regard, the Court of Justice of the European Union has ruled in several cases that discrimination against women in relation to pregnancy or maternity constitutes direct gender discrimination (e.g. Elizabeth Johanna Pacifica Dekker-Stichting VJV Centrum Plus, C-177/88) or that the non-renewal of a woman's fixed-term employment contract on the grounds of her pregnancy constitutes a violation of equal treatment (Maria

Luisa Jiménez Melgar v Ayuntamiento de Los Barrios, Case C-438/99). In 1989, the leaders of the then European Community Member States adopted the Community Charter of the Fundamental Social Rights of Workers (Community Charter) to further promote improvements in the living and working conditions of workers. Article 16 of the Charter provides for the principle of equal treatment between men and women and specifically draws attention to the need to take measures to enable men and women to reconcile their work and family responsibilities (Göndör, 2015).

The next legislative step is Directive 2006/54/EC on the implementation of the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation. The directive "established uniform rules to eliminate discrimination between men and women." (Göndör, 2015) The directive's progressive approach is that it establishes that equal treatment between men and women in matters of employment and occupation cannot be limited to legislative measures. Instead, or perhaps more appropriately – in addition, it is crucial to raise public awareness and change public attitudes. The organisation of information and awareness-raising programmes, therefore, determine the implementation of the principle of equal treatment and, as part of this, the issue of work-life balance, a call we can still agree with almost two decades after the directive was adopted. "In relation to the issues of reconciling work and family life, presenting possible solutions, teaching and developing positive ways of solving problems with the active involvement of the individual could bring about significant changes in the lives of families" (Göndör, 2015).

On 19 October 1992, the Council of the European Union adopted Directive 92/85/EEC on the introduction of measures to encourage improvements in the safety and health at work of pregnant workers and workers who have recently given birth or are breastfeeding. The Directive has had a significant effect on improving the living and working conditions of workers with young children. Among other things, the Directive emphasises that the protection of the safety and health of pregnant workers and workers who have recently given birth or are breastfeeding must not mean that women are discriminated in the labour market.

The next legislative act is Council Directive 96/34/EC on parental leave. The directive is basically an endorsement of the framework agreement between the general industry organisations, UNICE, CEEP and ETUC. "The agreement endorsed by the Directive sets out minimum requirements to

help reconcile the parental and employment responsibilities of working parents," (Göndör, 2015) such as provisions on parental leave, protection from dismissal, return-to-work requirements.

In chronological order, the next in the historical overview is the Charter of Fundamental Rights of the European Union, proclaimed in 2000 by the European Parliament, the Council of the European Union and the European Commission. Article 23 of the Charter on Equal Opportunities for Women and Men states that equality between women and men must be ensured in all areas, including employment, work and pay. (Göndör, 2015) Article 33, in the second paragraph, under the heading "Family and professional life", provides that everyone shall have the right to protection from dismissal for a reason connected with maternity and the right to paid maternity leave and to parental leave following the birth or adoption of a child. (Göndör, 2015)

The Commission of the European Union later held consultations with the social partners on how to further develop and improve work-life balance and reconciliation. "In 2008, the three general cross-sectoral European social partner organisations (ETUC, CEEP and BUSINESSEUROPE, formerly UNICE) and the European cross-sectoral social partner organisation representing a specific category of businesses (UEAPME) informed the Commission of their intention to start negotiations with the objective of revising the 1995 Framework Agreement on parental leave. This review was successfully completed in 2009, after which the Commission was jointly invited, in accordance with the EU legislative mechanisms, to submit a proposal for a Council Decision to implement the revised Framework Agreement. (Göndör, 2015) The result of this process is Council Directive 2010/18/EU, which gives effect to the revised framework agreement on parental leave concluded on 18 June 2009 by the social partners representing the various economic sectors in Europe (BUSINESSEUROPE, UEAPME, CEEP and ETUC). (Göndör, 2015) An important objective of the document is that "family policies must contribute to the achievement of gender equality and must be seen in the context of demographic change, the consequences of an ageing population, closing the generation gap, promoting female employment in the labour market and the sharing of care responsibilities between women and men." (Göndör, 2015) In this respect, the law itself lays down minimum requirements to facilitate the reconciliation of the parental and employment responsibilities of working parents, for example in relation to parental leave, employment-related rights and return to work.

The European Pillar of Social Rights, adopted in November 2017, sets out a comprehensive agenda for social policy reform and is closely linked to this subject. Article 9 of the document "explicitly addresses the issue of work-life balance, on the basis that it is a fundamental requirement of EU social policy to create working conditions for parents and carers that allow this balance to be achieved without disadvantages for workers in either area." (Sipka & Zaccaria, 2020)

The latest milestone in this legislative development is Directive (EU) 2019/1158 of the European Parliament and of the Council of 20 June 2019 on work-life balance for parents and carers. This will be discussed in the next subheading, but it should be noted that "although the above-mentioned Directive 2006/54/EC of the European Parliament and of the Council on the implementation of the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation, and its follow-up legislative acts regulate the labour law and social aspects of this area in a comprehensive manner, the adoption of the 2019 Directive has nevertheless brought an end to a long process which continues to focus on the labour market and occupational aspects of gender equality. (Sipka & Zaccaria, 2020)

DESCRIPTION OF TOPIC AREA

Summarising the historical development, we can see that the European Union has established a number of legislative acts declaring minimum EU civil rights in order to reconcile work and family responsibilities. "Work-life balance" itself is a term used to describe practices in achieving a balance between the demands of employees' family life and work life. (Todorova & Radulovikj, 2020) In particular, it should be stressed that work-life balance, as mentioned above, needs to be considered not only from the labour law perspective in order to get the full picture. However, EU legislation has mainly focused on this area for the above arguments. Nevertheless, there are other areas within labour law that deserve to be highlighted, as the right to privacy does not only concern family responsibilities and workers with families. (It should be noted briefly at this point that the question of whether a worker is considered to have a family, especially in the case of same-sex couples, is decided according to the rules of the national legal system, where there is no uniformity.) (Picken & Janta, 2019) Moreover, it does not necessarily

concern workers in the field of employment, since the development of the rights of self-employed workers, the promotion of their social security and minimum labour law protection is also an important issue, the rules of which have only begun to be developed in recent years.

The above mentioned has, therefore, focused mainly on the situation of women and workers with families, but the reconciliation of work and private life in labour law should not only concern these two categories of persons, one of the most striking examples of which is the recently formulated right to disconnect. The right to disconnect is, therefore, of considerable importance in the context of this topic, which is a reaction to the impact of digitalisation. Digital tools have made work more efficient and flexible for employers and employees alike, while at the same time created an 'always-on' work culture, where workers are available anytime, anywhere, even after working hours, which is clearly leading to a disruption of the work-life balance. The historical overview could not cover this right, as there is no EU legislation on the "right to disconnect". The Parliament wants to change this, so in 2021, it asked the Commission for legislation to ensure that workers can disconnect from work networks outside working hours without consequences, and for minimum standards for teleworking[12].

Finally, we should also note that the historical overview has focused mainly on legislative acts, but the European Union has also sought to promote the reconciliation of work and private life in a number of other ways[13]. This includes the continuous monitoring of the implementation of EU legislation, which involves producing a number of studies on the subject and organising seminars on the issues raised. Beside these, each year, the European Commission analyses the EU countries' economic and structural reforms programmes. Data collection is continuous, and many forms of support, including financial support for the implementation of various programmes, are being developed. Last but not least, the exchange of good practice is also of key importance, and the Commission of the European Union is constantly

---

[12] European Parliament (2021) Parliament wants to ensure the right to disconnect from work. https://www.europarl.europa.eu/news/en/headlines/society/20210121STO96103/parliament-wants-to-ensure-the-right-to-disconnect-from-work.

[13] Among the soft law instruments, we must also mention the European Council's Gender Equality Strategy, adopted in 2018 for a period of 5 years. COUNCIL OF EUROPE GENDER EQUALITY STRATEGY 2018-2023.
https://rm.coe.int/prems-093618-gbr-gender-equality-strategy-2023-web-a5/16808b47e1.

striving to achieve this. For example, the European Commission set up the Mutual Learning Programme to share practices on gender-balanced uptake of family leaves and flexible working arrangements, and on initiatives such as labels and certifications for employers with good work-life balance practices[14]. In addition to this, we are briefly presenting the EU's regulatory plans which, in addition to the above-mentioned directive, also contribute to this area.

WORK-LIFE BALANCE IN THE LIGHT OF CURRENT AND FUTURE LEGISLATION

One of the EU's hardly disputable goals is to strengthen Europe's social dimension and to give citizens easily enforceable rights. In this context, the European Pillar of Social Rights is an instrument to build a social Europe for the benefit of all European citizens. In addition to the social pillar, the relevant provisions of the Charter of Fundamental Rights must of course also be taken into account. In this regard, the most important tasks include:
- ensuring equal access to the labour market;
- creating decent working conditions;
- achieving work-life balance.

These points are particularly important as the general employment rate for women is still 11.6 percentage lower than that of men. This is a significant gap. The gap is even greater when it comes to part-time work. The share of women working part-time is 31.5%, compared to 8.2% for men. This also means that just over 50% of women work full-time, compared to 71.2% of men. All this is contextualised by the fact that caring responsibilities are the reason for inactivity for almost 20% of inactive women, compared to less than 2% of men[15]. It is also in the light of this data that the EU legislator has explicitly called for the separation of work and private life. Of course, the issue is not a recent one, as it was also raised in the aforementioned Directive 2010/18/EU. The EU not only expressed that, but explicitly highlighted why the emancipation of fathers is necessary. (Mélypataki & Prugberger, 2018) This emancipation has two directions. The involvement of fathers in family life makes it easier for mothers to juggle professional and private life. On the

---

[14] https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/gender-equality/women-labour-market-work-life-balance/eu-action-promote-work-life-balance_en.

[15] Work-life balance among parents and carers,
https://www.consilium.europa.eu/hu/policies/work-life-balance/ (23 June 2022).

other hand, it is also necessary to emancipate fathers. The father image of our time is also changing. However, it is also important to stress that strengthening the role of men in the family is crucial because we live in a world without fathers, so it is difficult for a son to identify a role model. (Léder, 2019) To add to the quotation, not only boys but also girls need the presence of a father. In the following, we briefly outline the most important provisions of Directive 2019/1158/EU[16].

In its preamble, the Directive refers to the promotion of equality between men and women and the reconciliation of professional and private life as a fundamental principle of the European Union. It is, therefore, important to highlight and quote the text of Point 6:

"Work-life balance policies should contribute to the achievement of gender equality by promoting the participation of women in the labour market, the equal sharing of caring responsibilities between men and women, and the closing of the gender gaps in earnings and pay. Such policies should take into account demographic changes including the effects of an ageing population".

Hence it is necessary to address the labour market effects on one or all of the parents and to approach the issue from a social perspective.

Based on Article 3 Paragraph 1 of the Directive, paternity leave means leave from work for fathers or where and insofar as recognised by national law, for equivalent second parents, on the occasion of the birth of a child for the purposes of providing care. Importantly, the concept also recognises the rights of equivalent second parents, even if it makes their actual enforcement dependent on national law.

Details of paternity leave are set out in Article 4. This entitles the father to ten working days of leave at the birth of his child. This is a more favourable rule than the previous one in many EU countries. It is important for fathers to be able to participate in the upbringing and care of the child from the very beginning, so that the mother can be freed from the burden. Paternity leave is an entitlement and shall not be made subject to a period of work qualification or to a length of service qualification. During the leave, the father is protected by labour law. Of course, this is paid leave.

According to Article 5 of the Directive: "Member States shall take the

---

[16] Directive (EU) 2019/1158 of the European Parliament and of the Council on work-life balance for parents and carers and repealing Council Directive 2010/18/EU
https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32019L1158.

necessary measures to ensure that each worker has an individual right to parental leave of four months that is to be taken before the child reaches a specified age, up to the age of eight, to be specified by each Member State or by collective agreement. That age shall be determined with a view to ensuring that each parent is able to exercise their right to parental leave effectively and on an equal basis". Unlike paternity leave, this leave can be subject to conditions. Such a condition could be a period of work qualification or a length of service qualification, which shall not exceed one year. In determining the leave, there are time periods that cannot be transferred to the other parent. The duration of this period is two months. The reason for this is also to ensure that everyone participates equally in family life and has almost equal opportunities to return to the labour market.

The Directive has stipulated at the level of protection that the above-mentioned forms of leave shall be paid leave. The Directive establishes a minimum benefit level, which certainly must be appreciated, but in our opinion will result in very wide variations. Despite the best efforts, there will be big differences. An important and uniformly applicable level of protection is going to be the use of the prohibition of dismissal.

In the framework of professional and private life, we need to look at the gender equality of women in business management. The figures are also clearly visible in EU statistics. Today, the proportion of women on the boards of the largest listed companies in the EU is only 30.6 per cent, and there are significant differences between Member States (from 45.5 per cent in France to 8.5 per cent in Cyprus)[17]. According to the latest data, the proportion of women in Hungary is 10.5%[18]. The figures also show why it is necessary to deal with gender equality and work-life balance. Point 3 of the preamble to the Directive[19]: "With a view to ensuring full equality in practice between men and women in working life, Article 157(4) TFEU permits positive action by allowing Member States to maintain or adopt measures providing for specific advantages in order to make it easier for the underrepresented sex to pursue a vocational activity or to prevent or compensate for disadvantages

---

[17] https://eige.europa.eu/gender-statistics/dgs/indicator/wmidm_bus_bus__wmid_comp _compbm/datatable.

[18] https:///www.europarl.europa.eu/news/hu/agenda/briefing/2022-11-21/0/nok-az-igaz-gatotanacsban-kotelezo- eu-szabalyok-a-kiegylyottsaghoz.

[19] Directive (EU) 2022/2381 on improving the gender balance among directors of listed companies and related measures https://eur-lex.europa.eu/eli/dir/2022/2381/oj.

in professional careers. Article 23 of the Charter of Fundamental Rights of the European Union (the 'Charter') provides that equality between women and men is to be ensured in all areas and that the principle of equality cannot prevent the maintenance or adoption of measures providing for specific advantages in favour of the underrepresented sex".

The main objective of the Directive is to achieve in the Member States by 2026 one of the targets set in Article 5 of the Directive:

a) members of the underrepresented sex hold at least 40% of non-executive director positions; or

b) members of the underrepresented sex hold at least 33% of all director positions, including both executive and non-executive directors.

The legislation focuses primarily on listed companies, with the provision that listed companies that are not subject to the objective set out in Article 5 Paragraph 1 Point (b) shall set specific quantified targets for director positions to improve gender balance. Member States need to ensure that such listed companies work towards achieving those specific quantified targets by 30 June 2026. The merits should of course be taken into account in the selection process. According to Article 6 the candidates shall be selected on the basis of a comparative assessment of the qualifications of each candidate. This is important to highlight because the application of quotas always raises questions. And the use and the perception of quotas may not always be helpful in educating society on the issue, especially if there are not sufficiently flexible rules. It also raises questions that no such criteria are set for other forms of companies. The effort itself is, therefore, a very positive thing, but it is not certain that the EU has built in enough mechanisms to filter out the disadvantages and negative perceptions that arise from its application.

In its preamble, the Directive (EU) 2023/970 of the European Parliament and of the Council[20] refers to the fact that COVID-19 has deepened the already existing pay gap between men and women. This is particularly highlighted in Point 13 of the preamble: "The economic and social consequences of the COVID-19 pandemic have had a disproportionately negative impact

---

[20] Directive (EU) 2023/970 of the European Parliament and of the Council to strengthen the application of the principle of equal pay for equal work or work of equal value between men and women through pay transparency and enforcement mechanisms
https://eur-lex.europa.eu/eli/dir/2023/970.

on women and gender equality, and job losses have often been concentrated in low-paid, female-dominated sectors. The COVID-19 pandemic has highlighted the continued, structural undervaluation of work predominantly carried out by women and has demonstrated the high socio-economic value of women's work in front-line services, such as health care, cleaning, childcare, social care and residential care for older people and other adult dependents, which stands in strong contrast to its low visibility and recognition."

The Directive also highlights that the gender pay gap reached 13% in 2020. These are factors that make it necessary to strengthen equality between men and women. This Directive is more indirectly related to the work-life balance issue than the ones mentioned above, but it is still an important regulation in the field of equal treatment.

The Directive also underlines that eliminating direct and indirect pay discrimination does not preclude employers from paying workers performing the same work or work of equal value differently on the basis of objective, gender-neutral and bias-free criteria.

However, transparency about pay is necessary, which is why there are already provisions in relation to job advertisements, which can be a first step in orienting applicants. The job advertisement itself must indicate, in accordance with Article 5 of the Directive, the following:

a) "the initial pay or its range, based on objective, gender-neutral criteria, to be attributed for the position concerned; and

b) where applicable, the relevant provisions of the collective agreement applied by the employer in relation to the position".

The Directive emphasises that employers shall ensure that job vacancy notices and job titles are gender-neutral. It identifies the importance of this in ensuring that recruitment procedures are led in a non-discriminatory manner. This is necessary in order not to undermine the right to equal pay for equal work or work of equal value.

For this purpose, the Directive sets out the framework for horizontal and vertical protection and the right to compensation.

SUGGESTED METHODS OF INVESTIGATION WITH EXAMPLES

The main research methods that may be employed in studies related to the

integration of the gender dimension in the area of work-life balance and organisation culture are:

– sex-disaggregated data analysis
– grey literature
– interviews
– legal research methods
– survey research

Study 1: 'Live to Work' or 'Work to Live'? A Qualitative Study of Gender and Work-life Balance among Men and Women in Mid-life

The preferred research method in this article is the quantitative research, especially interviews.

This article explores the ways in which men and women in mid-life negotiate the intersections between paid work and other areas of life. More specifically, in this qualitative study, the researchers compare the experiences of work-life balance among men and women in mid-life (aged between 50 and 52 years) in order to explore whether there were gender differences or similarities among the respondents. They also explored whether different gendered practices (i.e., different ways of doing work-life balance) were linked to different gender identities, and thus, to diversity among men and women. This article is based on semi-structured interviews with 11 men and 12 women born in the early 1950s (and so aged between 50 and 52 at the time of interview in 2002-2004).

Despite the similarities in the current work and family circumstances of these men and women, the collected data suggest that gender remains interwoven in the business of negotiating home and work life. The female respondents discussed their current and varied concerns about juggling paid work, adult children, and ageing parents, while the men tended to locate problems of work-life balance in the past; often when paid work conflicted with the demands of raising young children. Thus, while the presence of children in the household was associated with a lack of work-life balance for both men and women, these difficulties lasted longer, and took more complicated forms, for women. The data suggest that, across the life course, women are seen as being responsible for maintaining smooth, or preferably imperceptible, transitions between the worlds of home and work life.

The research also points to the importance of socioeconomic positions

when considering issues of work-life balance. The study suggests that, for some groups of employees, securing sufficient income may be a more pressing concern than balancing work and home life.

This study shows strongly how it can influence the economic and social points to secure and create of work-life balance. I think that the economical part is stronger. People worried about their incomes, so it could be easier for them to accept the imbalanced situations because of that, but it causes strong frustration also. I think, it is a general concern, however the study reflects also, that how it is growing the importance of work-life balance regarding in the light of individual circumstances.

The study has evaluation purpose.

Resources

- Emslie, C., & Hunt, K. (2008): *'Live to Work' or 'Work to Live'? A Qualitative Study of Gender and Work-Life Balance among Men and Women in Mid-life*. https://doi.org/10.11/j.1468-0432.2008.00434.x

Study 2: Work-Life Balance, and Gender Equality: Introduction

This article – as the title shows – is an introduction to a special issue, which brings together innovative and multidisciplinary research (sociology, economics, and social work) using data from across Europe and the US to examine the potential that flexible working has on the gender division of labour and workers' work-life balance.

This article connects to a bigger and more complex research with different research methods, for example interviews, legal research methods, sex-disaggregated data analysis and grey literature.

This study provides a review of the existing literature and the limitations of it on the gendered outcomes of flexible working on work-life balance and other work and family outcomes and summarizes the key findings of the articles of the special issue.

According to the study, one of the biggest limitations of previous studies on this topic is that they are mostly based on qualitative data – mostly interviews and observations. In addition, many of the studies also focus on professionals. Although there have been some studies using quantitative data, most have been using data from Anglo-Saxon countries. The papers of the

special issue, on which this study is based, tried to overcome this limitation by using quantitative methods.

The reason of the recommendation is the complexity of research. The different methods help us to better understand and know the typical problematic point of imbalanced situations.

The conclusions of the paper are the following:

Flexible working becomes more of a norm, rather than the exception, and this may help workers use flexible working arrangements for work-life balance purposes. However, gender matters when it comes to understanding the consequences of flexible working. Men and women use flexible working in different ways that leads to different outcomes for wellbeing, work-life balance and work intensification. A recurring finding is that women are more likely to (or expected to) carry out more domestic responsibilities whilst working flexibly, while men are more likely to (or are expected to) prioritise and expand their work spheres.

Gender must be studied in context; in the organisational, country, family, as well as class context. First of all, the culture of the organisation matters, such as the prevalence of flexible working in the organisation. Secondly, country contexts matter in that flexible working allows workers to "do gender" in a more traditional gender cultures such as Poland, and where a more gender egalitarian culture exists, such as in Sweden, the gender discrepancies due to flexible working may not be as evident. Thirdly, the household structures appear to be important in the outcomes of flexible working. There are differences in single versus dual earners, as well as low versus higher income families for both men and women. The occupation of the worker also matters.

Overall, the findings seem to indicate that especially in contexts where traditional norms on gender roles are prevalent and where ideal worker culture exists, flexible working may promote a more traditionalised division of labour resulting in hindering rather than supporting gender equality. This is likely because in such contexts, flexible working can lead to women being able to (but also having to) expand their household burdens, while men expand their work loads. This may reinforce the (unconscious) biases that employers and co-workers have towards the flexible working of men and women, and more female-oriented and male-oriented flexible working arrangements, which can increase the wage gap between the genders.

The paper also has some policy implications at macro, mezzo, and micro

levels. For example, it proposes that changing the right to request flexible working legislations to ensure that flexible working is more of a right from the first day on the job; that flexible working is more of a default rather than an exception would be useful in ensuring that it does not lead to stigma or work-life conflict.

This study reflects on the question also, how the intersection of gender, class and ethnicity effects and shapes the strategies of female academics of two ethnic groups in two Serbian universities developed to rationalize and explain their actions and decisions on work-life balance. The study is called 'Women's work-life balance strategies in academia'.

The study's main benefit is to show, how it can be a challenge to find the perfect balance between work and private life for academic faculty members.

The multifaceted demands and expectations of the role can affect faculty satisfaction and the ability to attain a work-life balance. The ever-changing trends in higher education, including technology and online education modalities provide additional factors that can inhibit faculty satisfaction and work-life balance. This paper explores barriers to achieving work-life balance such as cognitive dissonance, emotional dissonance, and burnout. Understanding barriers is essential to developing strategies to promote a work-life balance.

The research follows qualitative research methods based on semi-structured interviews.

The intersectional analysis conveyed that there is a difference between the strategies women used in order to cope with family and career obligations when it comes to different ethnic backgrounds. There is a class difference as well, which is intersecting with gender and ethnicity, thereby, resulting in a new inequality among women in academia.

This study (including the other studies of this collection) can be useful for intervention, monitoring and evaluation purpose also.

Resources

• Chung, H., van der Lippe, T. (2020) F*lexible Working: Work–Life Balance, and Gender Equality: Introduction*. Social Indicators Research 151, 365–381. https://doi.org/10.1007/s11205-018-2025-x

Study 3: The Power Gap among Top Earners at America's Elite Universities 2021 Study

This study is the first of two reports examining compensation and top leadership among USA's 130 major research universities (R1 as defined by the Carnegie Classification). The research was carried out in 2021 amongst United States of America research universities.

The goal of the Women's Power Gap Initiative (WPG) is to dramatically increase the number of women from diverse backgrounds among CEO and C-suite leaders nationally.

The study uses quantitative and qualitative methods also, especially data analysis.

This study focuses on USA's top 130 universities, which collectively educate 21% of all college and graduate students in the country, totalling nearly 4 million students each year, and employing 1.2 million staff. These institutions are major drivers of the state and national economies.

The researchers began with 131 "very high research activity," or R1 institutions, as defined by the Carnegie Classification and found in the Integrated Postsecondary Education Data System (IPEDS). Salary data was not publicly available for the University of Colorado Anschutz Medical Campus, which was excluded from the study. The resulting final dataset comprises 130 R1 universities. There are 93 public and 37 private institutions across 44 states.

Data was collected through public sources to populate a university profile outlining highest earners across each of the three categories identified by the researchers: Core, Athletic and Medical Centre. This profile was then shared with each institution. The correspondence explained the study and requested that each school validate and/or edit/update their top earners, including the gender of each top earner and year of compensation data. Each institution was also asked to provide aggregate racial/ethnic data for those highest paid employees. Researchers then attempted, through several rounds of written and telephone follow-up requests, to work with the designated official(s) at each institution to ensure completion of the data request.

Four main key findings were identified in this study: i) less than a quarter of top earners are women and their representation varies greatly by category, ii) women of colour are virtually nonexistent among top earners, iii) faculty and deans in traditionally male-dominated disciplines score the highest pay and iv) lack of data transparency impedes accountability and progress.

This report establishes a baseline that can be used to measure future progress in elevating women and people of colour to higher positions of compensation among USA universities. Stakeholders that financially support these institutions are provided with greater transparency around compensation.

The report can be useful for evaluation.

Source: https://www.womenspowergap.org/wp-content/uploads/2021/02/WPG-Power-Gap-at-Elite-Universities-2021-Study-2.pdf

Study 4. Report on monitoring working conditions and equal treatment at Adam Mickiewicz University

The aim of the survey was to identify, map out and describe the situation of male and female university staff in research, research-and-teaching, and teaching-only positions at Adam Mickiewicz University (AMU) in terms of social (in)equality. The main dimensions of social (in)equality in this survey are gender, distribution of power and recognition, and family situation. The following aspects were taken into account: working conditions (recruitment and promotion), the biographies of respondents, the culture of the organisation and of the working environment, manifestations of mobbing, microaggression, harassment, training, and reconciling professional and private life. Opinions expressed by staff at Adam Mickiewicz University were collected by means of a questionnaire, which provided the basis for drawing up conclusions and recommendations for the University authorities and faculties' heads.

The preferred method of this research was the survey.

The survey was initiated at Adam Mickiewicz University on the 17th of February and was completed on the 28th of March 2021. It was preceded by a pilot study assessing the research tool, i.e., CAWI online survey. Information about the survey, along with the website address of the questionnaire, was distributed to research, research-and-teaching, and teaching-only staff. The web application LimeSurvey was used for assessing the results. The basis for creating the research tool was the Gender Equality Audit and Monitoring (GEAM) survey developed as part of the H2020 ACT project by selected institutions working together with the Communities of Practice for Accelerating Gender Equality and Institutional Change in Research and Innovation across Europe (ACT). It was prepared with care so as to fully respect the privacy of those taking part in the survey. The final version of the research tool contained 76 survey questions divided into nine problem

groups, followed by a demographics form showing the distribution of the respondents' social and demographic characteristics.

There are three main results of this research work. First one is that combining work and private life puts much more of a burden on women than on men. The second one is that men perceive the unequal and more difficult situation of women in this area to a lesser extent than their female co-workers. The last one is that the increase in work and family commitments necessitated by the pandemic and the resulting tension between work and home (work-life balance) has affected female scholars to a greater extent.

This last research material can show us the typical problematic element and unbalancing situations in organisation cultures, which are the typical and common element from the viewpoint of two different institutions.

The study has diagnostic purposes.

Resource

• Gajewska G., Głowacka-Sobiech E., Chmura-Rutkowska I., Kokociński M., Wala K. (2022). *Raport z monitoringu warunków pracy i równego traktowania w UAM*. Wydawnictwo Naukowe UAM, Poznań.
https://press.amu.edu.pl/pub/media/productattach/g/a/gajewska_i_in_rapo rt_2022__amup_oa.pdf

Study 5. Organisational Culture and the Use of Work-Life Balance Initiatives: Influence on Work Attitudes and Work-Life Conflict.

This study examines employees' differing perceptions of organisational culture within a single organisation, with particular reference to managerial support of work-life balance (WLB) initiatives, career consequences of using WLB initiatives, organisational time expectations that may interfere with non-work activities, and the level of employee control over workload and when employees can take time off.

The main research method of this study was a survey and interviews.

The research on which the study is based has been prepared using survey data from 292 employees in an Australian university. These 292 employees represent about 11 % of the total employee number of the university. The overall sample comprised of 228 women and 64 men. In total, four dimensions of organisational work-life culture were assessed. Six hypotheses were predicted:

GEPARD

Co-funded by
the European Union

The study tries to find connection between the behaviour of the employees and the reaction of the employers from the different perspective (e.g., Employees who perceive higher levels of managerial support will report a higher use of WLB initiatives than employees who perceive lower levels of support).

The key findings of the research are the following: Perceptions of managerial support of WLB initiatives were related to intiative use. However, overall initiative use was not related to perceived career consequences (e.g., using initiatives will damage one's career progress), organisational time expectations or levels of employee control (e.g., over workload). Results showed that perceptions of a supportive organisational culture were positively related to organisational commitment and negatively related to work-life conflict and employees' intentions to leave. The study results also show that employees' perception of organisational culture was more strongly associated with the outcomes (e.g., work attitudes, work-life conflict) than the number of WLB initiatives used by the employees.

The study has evaluation purpose.

Resource

• Webber, Mardi & Sarris, Aspa & Bessell, M. (2010). *Organisational Culture and the Use of Work– Life Balance Initiatives: Influence on Work Attitudes and Work–Life Conflict*. The Australian and New Zealand Journal of Organisational Psychology 3, 54-56. DOI: 10.1375/ajop.3.1.54.
https://www.researchgate.net/publication/259419326_Organisational_Culture
_and_the_Use_of_Work-
Life_Balance_Initiatives_Influence_on_Work_Attitudes_and_Work-Life_Conflict

CONCLUSIONS

It is clear from the above that the pursuit of work-life balance and its guarantee by law is becoming increasingly important in the context of gender equality. The process is on the right track, but even after several decades, it is still rather at an early stage. The EU has correctly identified the direction, but there is still work to be done. One of the biggest challenges will be to ensure uniform interpretation of the law once the directives have been implemented by the Member States. This will also require the legal interpretation practice of the Court of Justice of the European Union, which can also be a reference point

for national courts. Work-life balance is an issue for both women and men. It is, therefore, a complex issue that needs to be addressed, and the EU has recognised this – the directives of the past few years have been written in this spirit. Hopefully, this direction will be maintained in the future.

Studies have clearly shown that the challenges at the beginning of this chapter remain a problem in this area. The primary problem is to reconcile expectations at work, career development and roles in private life. The cultural background is very decisive in this matter. This means that in the past, in many countries of Europe the social perception of gender roles was different from today's. Women were primarily involved in family and household management, while men were in the role of breadwinner. In many cases, leaving these roles brought with it a negative perception of society, thanks to which those involved did not have the courage to step out of this role. This stereotyped view of life has changed. With regard to raising children, running the household and tasks of everyday life, there is now a division of labour between family members. Everyone takes part in the performance of tasks, so these are no longer gendered roles. We note, however, that there are European states where it is more difficult to dissolve these social conventions, but the change can be traced everywhere. An important point of connection for this is that relationships have also changed during employment, the representation of the other sex appears in more and more jobs previously tied to one or the other gender, which has an impact on the intention to build a career. However, there are still jobs and tasks where gender specificity can still be observed. The same is true in decision-making, where the presence of women is still incomplete, so the balance is shifted considerably. These are the issues that require further development in the studied area.

REFERENCES

• Lipinsky, A., Schäfer, M., *Evaluation von Gleichstellungsplänen in Europa - Indikatoren im Praxistest*. [Evaluation of gender equality plans in Europe – Indicators in the practical test] Inc: M. Klemisch, A. Spitzley, J. Wilke (Eds.), *Gender-und Diversity-Management in der Forschung,* Fraunhofer, Stuttgart (2015), pp. 81-91.

• Aybars, A.I. 2007. *Work-Life Balance in the EU and Leave Arrangements across Welfare Regimes*. Industrial Relations Journal, 38 (6): 569 – 590.

• Beham, B., Drobnič, S., Präg, P., Baierl, A., Eckner, J., (2019). *Part-time work and gender inequality in Europe: a comparative analysis of satisfaction with work–life balance*. European Societies, 21:3, 378-402,
DOI: 10.1080/14616696.2018.1473627

• Buchanan, D., Fitzgerald, D., Ketley, D., Gollop, R., Jones, J.L., Lamont, S (2005). *No going back: A review of the literature on sustaining organizational change*. International Journal of Management Reviews, 7, pp. 189-205.

• Kalpazidou, Schmidt, E., Cacace, M., (2017). *Addressing gender inequality in science: The multifaceted challenge of assessing impact*. Research Evaluation, 26, 102-114.

• Göndör, Eva, 2015. *Munka és család a munkajog tükrében*. Győr: Università di Győr.

• Høg Utoft, E. (2020). *Exploring linkages between organisational culture and gender equality work: An ethnography of a multinational engineering company*. Evaluation and Program Planning, 79, [101791].
https://doi.org/10.1016/j.evalprogplan.2020.101791

• Baumann, H., (2017). *Stories of women at the top: Narratives and counternarratives of women's (non-)representation in executive leadership*; Palgrave Communications (2017), 10.1057/palcomms. 9

• Haar, J.M. 2004. *Work-Family Conflict and Turnover Intention: Exploring the Moderation Effects of Perceived Work Family Support*. New Zealand Journal of Psychology, 33 (1), 35 – 39.

• Bleijenbergh, I.L., Benschop, Y., Vennix, J., (2008). *Making gender equality a shared problem in organizations: Group model building as a gender mainstreaming method. Paper presentation; Critical Management Studies Research Workshop*, USC., Los Angeles.

• Hobbins, J., Kristiansen, E., Carlström., E., (2023) *Women, Leadership, and Change – Navigating between Contradictory Cultures*. NORA - Nordic Journal of Feminist and Gender Research 31:3, pp 209-221

• De Vries, J., (2015). *Champions of gender equality: Female and male executives as leaders of gender change*. Equality Diversity and Inclusion an International Journal, 34, 21-36.

• Koncz, K., (2010). *A munkaerőpiac nemek szerinti szegregációjának jelentése és mérése. Statisztikai Szemle*, 10-11. Kötet, 1087-1106.

• Léder, L., (2019). *Csendes Apa-forradalom*, H'armattan.

• Nielsen, M.W., (2017): *Scandinavian approaches to gender equality in academia: A comparative study*. Scandinavian Journal of Educational Research, 61, 295-318.

• Van den Brink, M., Benschop, Y., (2014). *Gender in academic networking: The role of gatekeepers in professorial recruitment*. Journal of Management Studies, 51 (3), 460-492.

• Mélypataki, G., Prugberger, T., (2014) ás, 2018. *A szülői szabadság rendezésének kérdése az európai irányelv-módosítások és a tagállami szabályozások tükrében*. Európai Jog, 3. kötet.

• Picken, N. & Janta, B., (2019). *Leave policies and practice for non-traditional families*. Publication Office of European Union.

• Adams, R.B., Ferreira, D, (2009). *Women in the boardroom and their impact on governance and performance*. Journal of Financial Economics, 94, 291-309.

• Kumra, S., Simpson, R., Burke, R.J., (Eds.), (2014) *The Oxford handbook of gender in organizations*, Oxford University Press, Oxford.

• Sipka,Péter & Zaccaria, Márton Leó, 2020. *A munka és magánélet közötti egyensúly kialakításának alapvető követelményeiről a 2019/1158 irányelvre figyelemmel*. Munkajog, 1. kötet.

• Straub, C. (2007). *A Comparative Analysis of the Use of Work-Life Balance Practices in Europe: Do Practices Enhance Females' Career Advancement?* Women in Management Review, 22 (4), 289 – 304.

• Szabó-Morvai, Ágnes (2017). *Közelkép - Nők a munkaerőpiacon, hely nélk.: ismeretlen szerző*

• Todorova, B. & Radulovikj, M. (2020). *Work-Life Balance: Challenges of Gender Equality in the Labor Market in the Republic of North Macedonia vs European Union*. Eu And Comparative Law Issues And Challenges Series (Eclic), 4. kötet.

• Tomer, G., Xanthakos, S., Kim, S., Rao, M., Book, L., Litman, H. J., Fishman, L. N., (2015). *Perceptions of Gender Equality in Work–Life Balance, Salary,*

Promotion, and Harassment: Results of the NASPGHAN Task Force Survey. Journal of Pediatric Gastroenterology and Nutrition 60(4), 481-485 DOI: 10.1097/MPG.0000000000000637

- Tünde, B., (2018). Kisgyermekes anyák munkaerőpiaci helyzete.

- Chandra, V., (2012). *Work–life balance: eastern and western perspectives*, The International Journal of Human Resource Management, 23(5), 1040-1056, DOI: 10.1080/09585192.2012.651339

CHAPTER 5

GENDER BALANCE IN LEADERSHIP
AND DECISION MAKING
Luna Carpinelli, Marco Navarra

INTRODUCTION

The historical underrepresentation of women in academic leadership positions has been the subject of several studies within the dimension of gender balance and leadership in academia.

Different reasons, including both gender-based discrimination and entrenched attitudes in academia, favour the advancement of men in an inherently competitive environment that does not facilitate equal treatment (Eddy et al., 2017; Allan, 2011).

To date, organizational work policies make it difficult for women to succeed, as they cannot have a specific role and function in their particular sectors.

Universities have paid relatively little attention to leadership development interventions to promote family- and work-life-friendly supervisory behaviours, which are effective in randomized controlled trials in other contexts (Kossek et al., 2019; Hammer et al., 2011).

With the introduction of the Gender Equality Plan as a strategy document, aimed at implementing actions and projects that favour the reduction of gender asymmetries, and at the same time, allow for the valorization of all diversities, an attempt was made to foster a cultural change, with the will to continue building a concrete and communicative learning and working environment, in which one perceives equity of treatment and the absence of discriminatory situations.

As stated by the European Institute for Gender Equality (EIGE), which produced a special report, research in Europe is still characterized by a marked under-representation of women. According to data collected by

the EIGE, women made up just one-third of researchers in the EU in 2018.

In addition to this, women face much greater difficulties in their career progression and their presence compared to men decreases sharply as the level and prestige of the position increases, as the figures show.

Women also have less access to networks that would help them advance their careers in administration and are less likely to fit into male groups (Dean et al., 2009; Glazer-Raymo, 2001), confirming the extent to which social stereotypes about men and women favour masculine traits in institutional leaders (Eddy et al., 2017; Allan, 2011).

AN OVERVIEW OF GENDER INEQUALITY IN LEADERSHIP AND DECISION-MAKING IN EU UNIVERSITIES

Gender inequality in leadership and decision-making in European Union (EU) universities continues to be a significant issue, despite efforts to promote gender equality in academia. While progress has been made in recent years, women still face substantial barriers and underrepresentation in top leadership positions and decision-making bodies within universities across the EU.

Gender equality in academia can vary across European Union (EU) countries due to cultural, social, and institutional factors. While it is challenging to provide an exhaustive analysis of all EU countries, here are some general differences that can be observed:

Legislative framework and policies: EU member states may differ in their legislative frameworks and policies promoting gender equality in academia. Some countries have implemented comprehensive gender equality legislation and specific policies targeting academia, while others may have fewer or less extensive measures in place.

Representation in leadership positions: The representation of women in leadership positions in academia varies across EU countries. Some countries have made significant progress in achieving gender balance in leadership roles, while others face significant disparities. Factors such as cultural norms, societal expectations, and institutional practices can influence the representation of women in academic leadership. Women in top leadership roles such as university presidents, rectors, and deans are significantly underrepresented. This lack of representation at the highest levels of decision-making perpetuates gender imbalances throughout the academic hierarchy.

Gender bias in recruitment and promotion: There is evidence of gender

bias in the recruitment and promotion processes within EU universities. Implicit biases may influence decision-makers, resulting in the preference of male candidates over equally or more qualified female candidates.

Gender pay gap: The gender pay gap in academia can differ between EU countries. Some countries have made efforts to address pay inequalities, while others still experience significant gaps. Women in leadership positions within EU universities often experience a gender pay gap, where they earn less than their male counterparts. This wage disparity further exacerbates the inequalities between men and women in academic leadership. Variations in labour market regulations, wage-setting mechanisms, and national economic factors can contribute to differences in the gender pay gap across countries. The pay gap not only impacts women's economic well-being but also reflects and reinforces the undervaluation of their contributions within academia.

Availability of family-friendly policies: The availability and effectiveness of family-friendly policies, such as parental leave, flexible working arrangements, and childcare support, can vary among EU countries. Countries with more robust family-friendly policies tend to provide greater support for work-life balance, benefiting both men and women in academia.

Institutional practices and culture: Institutional practices and cultural norms within academic institutions can significantly influence gender equality. Some countries may have more inclusive and supportive institutional cultures, with measures in place to combat gender bias and promote equal opportunities, while others may have more traditional or conservative academic cultures that perpetuate gender inequalities.

Societal attitudes and gender norms: Societal attitudes and gender norms play a crucial role in shaping gender equality in academia. Countries with more progressive attitudes towards gender equality may be more likely to prioritize and implement policies and initiatives promoting gender balance in academia.

Research funding and resources: Variations in research funding and resource allocation can impact gender equality in academia. Countries that allocate resources specifically to support gender equality initiatives, research projects, and career development programs for women in academia may have more progress in this area.

Efforts are being made at various levels to address these gender inequalities. The EU has implemented policies and initiatives to promote

gender equality in academia, such as the Horizon Europe program, which includes specific provisions for gender equality in research and innovation. Additionally, some universities have implemented gender equality action plans, mentorship programs, and unconscious bias training to foster a more inclusive environment.

However, sustained commitment and further action are necessary to achieve substantial progress in overcoming gender inequality in leadership and decision making in EU universities. This includes addressing systemic biases, promoting gender diversity, implementing family-friendly policies, and providing equal opportunities for women to advance and contribute to shaping the future of academia.

DESCRIPTION OF TOPIC AREA

Barriers to career advancement for female academics

Women face numerous barriers that prevent their advancement to leadership positions ("glass ceiling effect") and to career advancement, which contribute to the persistent gender gap in higher education. These barriers include implicit biases, stereotyping, lack of mentoring and sponsorship opportunities, limited access to networks, and gendered expectations of caregiving responsibilities.

Implicit bias and gender stereotypes: Implicit biases and gender stereotypes influence how women are perceived in academic settings. Stereotypes that associate leadership and authority with masculine traits can undermine women's credibility and hinder their career advancement. Implicit biases may affect hiring decisions, promotions, and opportunities for leadership roles.

Unconscious biases: Unconscious biases persist within academic institutions and can influence the evaluation of women's competence, confidence, and leadership abilities. These biases often disadvantage women in leadership and decision-making processes.

Lack of representation in leadership positions: The underrepresentation of women in top leadership positions, such as department chairs, deans, and university presidents, creates a lack of role models and mentors for aspiring female academics. The absence of female representation in leadership positions can perpetuate gender imbalances and limit women's access to influential networks and opportunities.

Lack of gender diversity in decision-making bodies: University committees

and governing bodies often lack gender diversity, with men dominating key decision-making positions. This lack of representation perpetuates a narrow perspective in decision-making and hampers the progress towards gender equality.

Implicit bias in evaluation and promotion processes: Women often face biases in evaluation and promotion processes, resulting in their work being undervalued or overlooked. Research has shown that women's achievements are sometimes evaluated differently or seen as less impressive compared to their male counterparts, affecting their opportunities for career progression.

Work-life balance challenges: Balancing academic careers with family responsibilities continues to be a significant challenge for women. The expectation of long working hours, inflexible schedules, and the absence of supportive policies, such as affordable childcare and flexible work arrangements, can make it difficult for women to fully engage in their academic work and advance their careers. The academic sector traditionally places high demands on professionals, which can create challenges for women seeking leadership roles while balancing family responsibilities. Insufficient support for work-life balance, such as inadequate parental leave policies or flexible work arrangements, can hinder women's career progression.

Gendered expectations and stereotypes in academia: Academic culture may reinforce traditional gender roles and expectations, such as the perception that women should primarily focus on teaching rather than research or assume more service-oriented roles. These expectations can limit women's access to research opportunities, funding, and professional recognition.

Limited networking opportunities: Networking plays a crucial role in career advancement. However, women may face barriers to networking, such as exclusion from informal networks or social events due to gender-segregated environments or unconscious biases. Limited access to networks can result in missed collaborations, mentorship opportunities, and visibility for career advancement.

Persistent gender pay gap: Women in academia often experience a gender pay gap, with lower salaries compared to male colleagues, even when checking for factors such as rank and discipline.

Addressing these barriers requires a multifaceted approach involving individuals, institutions, and policies. Initiatives such as unconscious bias training, mentorship programs, family-friendly policies, transparent and equitable evaluation processes, and increased representation of women in

leadership positions can help create a more inclusive and supportive environment for female academics to advance their careers.

Reflections on gender roles in the research environment and Academia
Gender roles in the research environment and academia have been the subject of significant reflection and discussion. There is a recognition that gender disparities exist within academia, particularly in higher-level positions and leadership roles. Women are often underrepresented in fields such as science, technology, engineering, and mathematics (STEM), and face challenges in terms of career progression, promotion, and recognition for their work.

Gender stereotypes and biases can influence the experiences of individuals in the research environment. These stereotypes can perpetuate the notion that certain fields or disciplines are more suited to one gender, leading to a lack of diversity and limited opportunities for women in traditionally male-dominated fields. Implicit biases and discrimination can affect decision-making processes, including hiring, promotion, and funding allocation. These biases can disadvantage women, leading to fewer opportunities for career advancement and recognition.

Balancing personal and professional responsibilities continues to be challenging, particularly for women in academia. The pressure to excel in research, teaching, and administrative tasks can intersect with expectations related to caregiving and family responsibilities, impacting career progression and advancement opportunities. Institutions play a critical role in addressing gender disparities. Implementing policies and practices that promote gender equality, such as family-friendly policies, transparent hiring and promotion processes, and diversity initiatives, can help create a more inclusive and supportive research environment.

Mentorship and support systems are crucial for fostering gender equality in academia. Having access to mentors, both male and female, who can provide guidance, advice, and support can be instrumental in helping women navigate the challenges and barriers they may face in their careers.

Recognizing the intersectionality of gender with other dimensions of identity, such as race, ethnicity, and socioeconomic background, is essential. Women from marginalized groups often face additional barriers and challenges, and efforts to address gender inequality should take into account the complexities of these intersecting identities.

Increasing the representation of women in leadership positions and decision-making bodies is crucial. Having diverse perspectives at all levels of academia can lead to more inclusive policies, practices, and research outcomes.

Overall, ongoing reflections on gender roles in the research environment and academia are essential for driving positive change and creating more equitable and inclusive spaces for all individuals. Efforts to address gender disparities should be comprehensive, involving individuals, institutions, and systemic changes to create a more diverse and inclusive research community.

SUGGESTED METHODS OF INVESTIGATION WITH EXAMPLES

In gender equity research, both quantitative and qualitative methodologies can make significant contributions. Below are some specifics on the most commonly used methodologies in both contexts:
– Sex-disaggregated data analysis
– Interview
– Social Media Content Analysis
– Survey Research
– Gender balance in leadership and decision making: case studies and reports

Gender balance in leadership and decision making is a critical topic, and several case studies and reports have examined this issue. Here are a few notable examples:

***Study 1*: Lester, J. (2015). "Cultures of work-life balance in higher education: A case of fragmentation".**
***Journal of Diversity in Higher Education*, 8(3), 139-156.**

In response to demographic shifts, colleges and universities implemented new policies, adopted new practices, and created professional development opportunities to gain support for work-life balance. Research on work-life balance reveals gender disparities, lack of policy usage, and a lack of cultural change with little understanding of the ways to bring about a campus culture that understands, promotes, and has established norms that support work-life balance.

Research often recommends that cultural change be established to support policy usage and reduce the stigma of work-life balance. This research study examined two institutions of higher education to challenge the notion that

organizational change can be simply created and to examine the impact of fragmented cultures and individual identity on change. The two major themes – symbolic meaning of policies and children and discontinuity of symbols and policies – that emerged in this study provide evidence of the need for campuses to contend with organizational culture and, in particular, on symbols and discourses intentionally presented to reflect work-life balance acceptance. This study concludes with the recommendation of how leaders, faculty, and policymakers can support work-life balance within higher education despite the ambiguity and complexity of organizational life.

The focus of this study was two colleges with similar characteristics. Both are of the same institutional type (private), received external funding to promote work-life policies, and have a reputation for at least attempting to address cultural change around work-life balance.

Data collection included 28 interviews, document analysis, and observations at the two institutions of higher education – Incremental Change University and Rapid Change University. One-on-one semi-structured interviews provide the primary data for this study. Each participant was interviewed once with the interview lasting approximately one hour. The interviews were audiotaped and transcribed. The interview questions and prompts focus on three key themes: (a) investigate working models for work-life balance in organizational culture; (b) identify how symbols (e.g., existence and usage of policies, discourse, and myths or stories) operate to establish and perpetuate a work-life balance culture; and (c) understand the role of leadership and policy in developing a work-life balance culture. Questions included: How would you characterize the environment or culture of the campus in relation to the change effort? What specific institutional aspects (e.g., structures, policies, practices) do you perceive as facilitative or inhibitive of work-life cultures? What signals to you that campus administration, your department or your unit believes in work-life balance? I also continued to collect documents during the campus visits, to include: campus newspapers, brochures, articles written by participants on change activities, and reports related to work-life balance.

This study concludes with a recommendation of how leaders, faculty, and policymakers can support work-life balance within higher education despite the ambiguity and complexity of organizational life. The purpose of this paper is to map the barriers to women leadership across healthcare, academia and business, and identify barriers prevalence across sectors. A barriers thematic map, with quantitative logic, and a prevalence chart have been developed,

with the aim of uncovering inequalities and providing orientation to develop inclusion and equal opportunity strategies within different work environments.

Recommendation: Evaluation

• **Source**: Lester, J. (2015). *Cultures of work-life balance in higher education: A case of fragmentation*, Journal of Diversity in Higher Education, 8(3), 139-156. Doi:10.1037/a0039377,
https://psycnet.apa.org/doiLanding?doi=10.1037%2Fa0039377

Study 2: **Strong, E. A., De Castro, R., Sambuco, D., Stewart, A., Ubel, P. A., Griffith, K. A., & Jagsi, R. (2013). Work-life balance in academic medicine: Narratives of physician-researchers and their mentors.** *Journal of general internal medicine*, **28(12), 1596-1603.**

A growing number of recent medical school graduates, both men and women, seek balance between their professional and personal lives. This trend may be influenced by broader societal changes, such as the modern movement of women into the paid labour force and the increasing expectation that men participate in parenting and housework. Men and women in the current generation of physicians, in particular, have been found to possess a strong sense of responsibility for family life and parenting, and thus, may experience discontent or tension if work demands impinge upon a more a balanced lifestyle. These developments within the medical profession are important to understand, in part, because of their potential impact upon patients, whose experiences and outcomes depend upon a dedicated cadre of clinicians and researchers.

BACKGROUND: Leaders in academic medicine are often selected from the ranks of physician-researchers, whose demanding careers involve multiple professional commitments that must also be balanced with demands at home. OBJECTIVE: To gain a more nuanced understanding of work-life balance issues from the perspective of a large and diverse group of faculty clinician-researchers and their mentors. Purposive sampling was utilized to collect a diverse set of viewpoints. Both men and women were included with oversampling for racial and ethnic minorities. Individuals from a variety of medical specialties and academic institutions were chosen. The selected ones were those who remained at their original institution at the time of K award, those who had changed institutions, and those who had

left academic positions (as determined by internet searching), as well as those who had gone on to attain R01 funding and those who had not (as determined through the NIH RePORTER database). In academic medicine, in contrast to other fields in which a lack of affordable childcare may be the principal challenge, barriers to work-life balance appear to be deeply rooted within professional culture. A combination of mentorship, interventions that target institutional and professional culture, and efforts to destigmatize reliance on flexibility (with regard to timing and location of work) are most likely to promote the satisfaction and success of the new generation of clinician-researchers who desire work-life balance.

In sum, this study provides important insights on the ways in which concerns about work-life balance affect those pursuing careers in academic medicine. Institutional leaders and policymakers should carefully consider the insights offered by our participants, particularly regarding the concerns about gender stereotyping and the stigma associated with utilizing certain policies intended to provide support. A combination of mentorship, interventions that target institutional and professional culture, and efforts to destigmatize reliance on the flexibility of academic careers, is most likely to promote the satisfaction and success of the new generation of clinician-researchers who desire balance in their careers and their family lives.

Recommendation: evaluation

• **Source**: Strong, E. A., De Castro, R., Sambuco, D., Stewart, A., Ubel, P. A., Griffith, K. A., & Jagsi, R. (2013). *Work-life balance in academic medicine: Narratives of physician-researchers and their mentors*. Journal of general internal medicine, 28(12), 1596-1603.
https://link.springer.com/content/pdf/10.1007/s11606-013-2521-2.pdf?pdf=button

***Study 3*: Lendák-Kabók, K. (2022). Women's work-life balance strategies in academia. *Journal of Family Studies*, 28(3), 1139-1157.**
Finding an optimal work-life balance is an open issue that is yet to be resolved in academia. Dubois-Shaik and Fusulier (2017, p. 100) argue that the university 'vehicles a 'gendered order' in its structures, its principle of organization, its customs and ways of doing things; in short in the practice of scientific work'. They explain how the old structure of the university rested on a masculine figure who was completely immersed in his work and did not have to do anything in the

household, as 'an invisible person' did all the domestic duties for him. These authors add that women, thus, need to work on cultivating a masculine figure, which results in their having fewer children (Dubois-Shaik & Fusulier, 2017, p. 100).

Although work-life balance in academia is a widely represented topic in the academic discourse, there is still no structural solution to this phenomenon. The main aim of this article is to analyse how the intersection of gender, class and ethnicity effects and shapes the strategies of female academics of two ethnic groups at in two Serbian universities developed to rationalize and explain their actions and decisions on work-life balance.

The qualitative research was based on 20 semi-structured interviews. Narratives of both male and female academics and students from three ethnic groups (Hungarian, Slovak and Romanian) and the majority Serbians inhabiting the Vojvodina region of Serbia were studied.

Snowball sampling was used when deciding who to interview (Esterberg, 2001). The author used her own academic network to find respondents, who then further recruited future respondents from their acquaintances. To ensure the diversity of the respondents, the author chose, at most, one acquaintance of any previously interviewed respondent.

The interview grid consisted of 13 questions grouped into the following six topics: (1) childhood, schooling and Serbian language proficiency for ethnic minorities; (2) difficulties during their career (e.g. language barrier for ethnic minority academics); (3) family and career; (4) gender-based segregation in academia; (5) opinions about (Hungarian and/or other national minority) women building research/teaching careers or occupying decision-making positions within academia; and (6) opinions regarding the organization of higher education with respect to minority languages.

The findings show that when explaining their attitudes and decisions, women used certain rhetoric and life strategies. The intersectional analysis conveyed that there is a difference between the strategy's women used in order to cope with family and career obligations when it comes to different ethnic backgrounds. There is a class difference as well, which is intersecting with gender and ethnicity, thereby resulting in a new inequality among women in academia.

The challenge of finding work-life balance is great for women, who decide to deal with it on a micro level, in their own family and in their own way not questioning the organizational structures upon which work in the academic social context is based.

Recommendation: evaluation

- **Source**: Lendák-Kabók, K. (2022). *Women's work-life balance strategies in academia*, Journal of Family Studies, 28(3), 1139-1157. https://www.tandfonline.com/doi/full/10.1080/13229400.2020.1802324?cas a_token=Pm9GFvPE5tMAAAAA%3ArcsIJy3ISbdsLf3vxhif_IQgCcxbBG_f9tvfU NX9GWw_Q0i6jg1RAai7 S0cenhLOJnuXozgtAmM

Study 4: "Gender Equality in Power and Decision-Making" - European Institute for Gender Equality (2019).

This report provides an overview of gender balance in decision-making positions across various sectors, including academia. It highlights the current status, challenges, and policy measures to promote gender equality in leadership roles.

Study 5: "She Figures" - European Commission (2021)

The *She Figures* report presents key indicators on gender equality in research and innovation in European countries. It includes data on the representation of women in leadership positions and decision-making bodies in academia and research organizations.

Study 6: "Women in Science, Technology, Engineering, and Mathematics: A Case Study on France" - Organisation for Economic Co-operation and Development (OECD, 2021)

This case study focuses on gender balance in leadership positions in the STEM fields in France. It examines the barriers faced by women, policies promoting gender equality, and strategies to increase women's representation in decision-making roles.

Study 7: "Mind the Gap: Women in Senior Leadership Positions in Universities" - Universities UK (2015)

This report explores the representation of women in senior leadership positions within UK universities. It examines the barriers to progression, highlights good practices, and provides recommendations to address the gender imbalance in leadership roles.

Study 8: "Advancing Women in Science, Technology, Engineering, and Mathematics (STEM) Careers" National Academies of Sciences, Engineering, and Medicine (USA, 2020)

This report discusses the underrepresentation of women in leadership roles in STEM fields in the United States. It examines the factors contributing to the gender gap, identifies effective strategies, and provides recommendations for promoting gender balance in STEM leadership.

These case studies and reports offer valuable insights into the challenges, progress, and initiatives related to gender balance in leadership and decision-making roles. They provide evidence-based recommendations for promoting gender equality and advancing women's representation in academia and other sectors.

CONCLUSIONS

Despite the progress made in recent decades, achieving gender equality in various workplaces and professions, including academia and research, remains a major challenge. Both at the European and national level, public policies can be noted that show an increasing focus on equality in academia and research.

The European Commission, with the H2020 Programme, made a commitment to ensure the effective promotion of gender equality and the gender dimension in the context of research and innovation in the member states of the European Union. Equally important was the decision to make the presence of Gender Equality Plans (GEPs) or Gender Equality Plans mandatory from 2022 onwards in ERC programs as an eligibility criterion for universities and research institutions.

Despite the increasing attention paid to the issue of gender gaps in research and academia in the European Union, Spain, and more recently, also in Italy, many obstacles remain to be overcome and challenges to be faced to eliminate gender inequalities in academia. Public policies have a key role to play in bridging this gap.

The European Institute for Gender Equality EIGE recommends that, to be effective, GEPs adopted in universities, research institutes, and research evaluation agencies must affect organizational processes, through the support of top management, the allocation of adequate economic and human resources, the collection and monitoring of data on the evolution of

the gender gap in academia, and gender training of all staff. But they must also affect the content of the actions, introducing measures that allow for work-life balance, gender equality in decision-making, gender equality in career contracting and promotion, integration of a gender approach in the content of research and teaching, and measures against gender-based violence, including sexual harassment. This requires adequately resourced competent structures for the implementation and monitoring of the effective implementation of adopted policies and the entire academic community's commitment to implementing equality measures.

REFERENCES

• Eddy, T., et al., (2017). *Recovery from Anorexia Nervosa and Bulimia Nervosa at 22-Year Follow-Up*. Journal of Clinical Psychiatry, 78(2):184-189.

• Allan, S. (2011). *Introduction: Science journalism in a digital age*. Journalism, 12(7), 771- 777. https://doi.org/10.1177/1464884911412688

• Kossek, E.E., et al., (2019) *Boundaryless Work: The Impact of COVID-19 on Work-Life Boundary Management, Integration, and Gendered Divisions of Labor for Academic Women in STEMM*, https://nap.nationalacademies.org/read/26061/chapter/1#ii

• Hammer LB, Kossek EE, Anger WK, Bodner T, Zimmerman KL. (2011). *Clarifying work-family intervention processes: the roles of work-family conflict and family-supportive supervisor behaviors*, Journal of Applied Psychology, 96(1):134-50.

• Dean M, Raats MM, Grunert KG, Lumbers M; *Food in Later Life Team. Factors influencing eating a varied diet in old age*. Public Health Nutrition, 12(12):2421-7.

• Glazer-Raymo, J. (2001). *Shattering the Myths: Women in Academe*. Johns Hopkins University Press.

CHAPTER 6

TOWARDS GENDER EQUALITY
IN RECRUITMENT AND SELECTION FOR ACADEMIC POSTS
Małgorzata Chrupała-Pniak, Katarzyna Więcek-Jakubek

INTRODUCTION

The purpose of the chapter is to present some of the existing research in the area of diagnosing the gender gap in recruitment and selection processes in the science and higher education sector.

Since the publication of the European Technology Assessment Network report (Osborn et al., 2000), universities and research organizations throughout Europe started to undertake various measures to overcome gender inequalities. According to the report, gender is often too significant a factor influencing the person's entering, functioning and success in the scientific community. After finding out that the percentage of women holding top positions grows very slowly, a number of recommendations aimed to change that situation have been suggested.

The document that has the greatest impact on the European HR management in research is The Human Resources Strategy for Researchers (HRS4R) issued by The European Commission. So far, 708 organizations have received the HR Excellence in Research award (and the number still grows), which means that they officially committed, implemented the Code of Conduct and proposed next steps to further implement the Charter and Code principles, which include non-discrimination, calls for adequate working conditions and work-life balance, as well as gender balance in the staff structure. Gender equality principles set out in Research & Innovation HR management focus mainly on recruitment, selection and promotion procedures. Working conditions, work-life balance, and combining academic career with care responsibilities are also defined as the key issues.

Introduction to the structural change in the organizations shall take place, mainly by the implementation of Gender Equality Plans (GEPs), widely recommended by the European Union since 2015. EU legislation obliges member states to provide equal opportunities and equal treatment for women and men and to fight any form of gender discrimination.

GEPs are commonly used in many countries in Europe. However, gender issue still plays a role in terms of career opportunities. Women are often employed at the lower academic positions, but the number of female academics at higher positions is still significantly lower (Silander, 2023).

Since Max Weber, the possibilities provided by personal systems to avoid discrimination and inequality in a workplace have been widely discussed by the organizational researchers. According to research, there is a number of activities considered to help with achieving gender equality: (1) structures of organizational responsibility, (2) affirmative action plans, or (3) transparent hiring and promotion processes (Silander, 2023).

However, defining the kinds of GE measures to use in the higher-education institutions is not an easy task. Only a few studies have been conducted on the subject. The findings showed revision of the existing organizational cultures as very important in this respect as well as conducting the affirmative action activities (Silander, 2023).

Following other researchers, the author claimed that a number of measures introduced to expand GE at the universities were subject to criticism either for not considering gender theories or for being created according to the liberal feminist approaches not taking into account the gendered academic structures. Researchers investigated policy measures introduced at universities in different countries to prevent women's underrepresentation. Yet, apart from a few reports on the steps taken to achieve GE at the European universities, in general, no comprehensive study on GE activities have been conducted so far (Silander, 2023).

The above three objectives have been established for the Gender Equality Plans introduced as a part of the EU funded projects:

(i) to remove barriers in recruitment, retention, and career progression of female researchers,

(ii) to ensure GE in decision-making processes, ,

(iii) to implement more gender dimension in research (Council of the European Union, 2015).

At the same time, it should be emphasized (Nielsen, 2017) that gender bias seems to be one of the biggest challenges, as it is common and has a widespread negative impact on women academics. What are the examples of the gender bias in an organization?

(i) women are considered less professional than men even with the same CV or number of publications,

(ii) letters of recommendation describe women with features and skills that are less needed in terms of an academic career,

(iii) job offers use predominately masculine language and other male cultural dimensions,

(iv) women are less quoted by their fellow academics,

(v) students tend to be harsher in evaluating their female academic teachers.

There are three social processes that, in combination, cause inequalities in academic recruitment and selection: (i) gender biases among hiring managers; (ii) setting standards for assessments of the scientific performance; and (iii) symbolic boundary in work depending on the gender. All three are shaped by the organisation, but not all of them can be explained by an unconscious bias. As Nielsen points out, gender bias in academia has many different forms, among others homophily (the tendency to seek out or be attracted to someone similar to oneself). In academic recruitment, it may pass unnoticed among other criteria of research performance that seem objective (Nielsen 2017). The cultural narratives of academic managers, who consider women's qualities as researchers inconsistent with the predominant organizational image of the perfect academic may also occur.

Unconscious bias is often the cause of the cognitive errors resulting in the unfavourable treatment of women and minorities by well-intentioned decision makers (Bielby, 2013). That phenomenon is crucial to understanding the gendered academic recruitment. Since its focus on cognitive processes, unconscious bias may indicate the gender discrimination to be an individual problem, overlooking more complex questions on gendered structures or hierarchies at a given higher education institution (Nielsen 2017).

The "glass ceiling" metaphor is often used to describe the problems with equal opportunities in career advancement for men and women. It represents the invisible barriers that prevent women from holding the highest positions in an organization. The formal organizational rules may promise fair

opportunities for women to compete with men, while the informal practices can still predominate and create a barrier, that the women cannot overcome (Teelken et al., 2021).

DESCRIPTION OF THE TOPIC AREA

Although gender inequalities in the academic sector are known and discussed, the activities aiming to address the problem are relatively slow. The situation does not improve despite the growing number of Diversity, Equity, Inclusion (DEI) initiatives in many organisations (She Figures, 2021).

Gender inequality in higher education is well documented in many countries. While EU sources inform that the number of women researchers started to grow in the European Union, the heterogeneity is still a problem in many member states. In the EU, 33% of researchers are women (see Figure 5.4-12). The member state with the highest number of women researchers work is Latvia – with 51% and the member state with the smallest number of female researchers is Czechia with 21%. The UK has more female researchers than the EU by six percentage points. However, such figures are likely to mask the sectorial research specialisation of the different countries. Figure 5.4-13 shows how a large majority of female researchers work in the health and care sector, but very few of them work in the engineering and technology sector (https://data.europa.eu/doi/10.2777/497405).

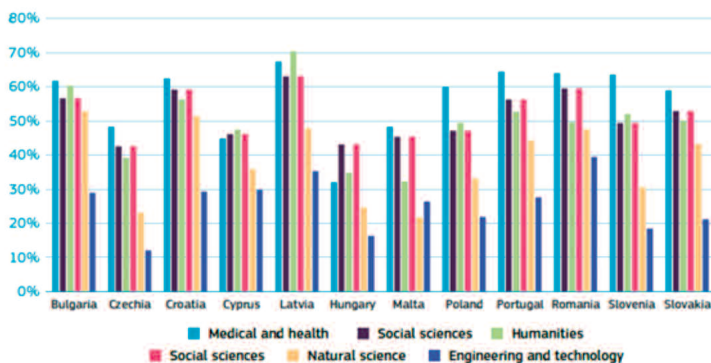Figure 5.4-12: Share of women researchers[1], 2009 and 2019
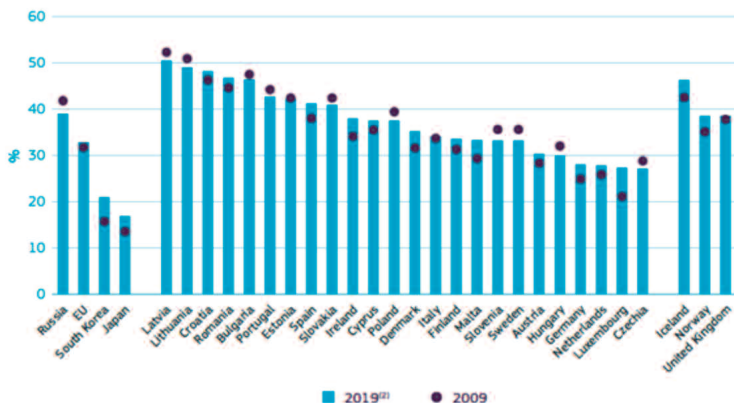
Science, Research and Innovation Performance of the EU 2022

Source: Eurostat (online data code: TSC00005)
Note: [1]The share of women researchers among total researchers in head count in all institutional sectors. [2]UK, IS: year 2018
Stat. https://ec.europa.eu/assets/rtd/srip/2022/figure-5-4-12.xlsx

Figure 5.4-13: Share of women researchers by field[1], 2019

Science, Research and Innovation Performance of the EU 2022

Source: DG Research and Innovation – Common R&I Strategy and Foresight Service – Chief Economist Unit, based on Eurostat
(online data code: RD_P_PERSSCI)
Note: [1]Share of women researchers out of total researchers by field in Full-time equivalent. Data for the remaining EU countries
is not available.
Stat. https://ec.europa.eu/assets/rtd/srip/2022/figure-5-4-13.xlsx

A review of research shows that gender neutrality as well as full openness to competition are not maintained in recruitment and promotion systems (Powell, 2016). The studies show that female researchers may be at a disadvantage in academic recruitment processes only because of the lack of adequate networks and subtle gender biases among the selection committee (Nielsen, 2016).

Most research on evaluation in the academic sector is focused on discrimination cases and failure to evaluate persons according to their actual competences and skills, in the fair way (Orupabo & Mangset, 2022). It seems that the most unconscious biases are the biggest challenge in recruitment, while also providing a proper structure of the individual recruitment process (Corrales et al., 2017).

The way of assessing merit and making recruitment choices is not important only for the individuals participating in the process. It affects the demographic structure of the faculty and discipline as a whole which, in turn, influences the image of the 'ideal academic' (Rivera, 2017). The lower employment of women in academia is driven by a "glass ceiling" that prevents them from career advancement and fails to develop their potential (Farina et al, 2023). Moreover, the inequality discourages young women from pursuing their academic careers, thus, contributing to stronger gender stereotypes.

More than ever, inclusive human capital policies of the academic sector are needed to create a fair and supporting work environment for everyone, regardless of gender. It seems that a fair and objective recruitment and selection process is one of the most significant factors in achieving this goal.

SUGGESTED METHODS

The sample research methods that can be used in studies on the recruitment and selection processes for academic positions are:
(i)   desk research,
(ii) bibliometric study,
(iii) survey,
(iv) survey experiment,
(v) in-depth interview/structured or semi-structured interview,
(vi) meta-analysis,
(vii) cross-case comparison,
(viii) case studies.

It was observed that different research methods are chosen by the researchers depending on the respondents (e.g., decision makers, higher academic positions, non-academic staff, etc.)

SCIENTIFIC RESULTS IN GENDER BIAS IN ACADEMIC RECRUITMENT AND SELECTION

A review of the research done for this chapter indicates several actual articles cited below. A reading of them confirms that the research mainly covers Scandinavian countries, Germany, the Netherlands, and other Western European countries. By contrast, in central and eastern Europe, researchers' interest in gender inequality in the HEI sector is much lower. This suggests that our publication should be primarily disseminated in these countries.

Study 1. Gender Bias in Academic Recruitment? Evidence from a Survey Experiment in the Nordic Region (Carlsson et al., 2021)

The study by Carlsson et al. entailed a large-scale survey experiment among faculty in Economics, Law, Physics, Political Science, Psychology, and Sociology from universities in Iceland, Norway, and Sweden in order to examine the role of bias in academic recruitment. On the basis of the research, the following hypotheses were formulated:

(i) Female applicants have lower ratings on competence and hireability than males [H1]
(ii) Females have a lower return to children than males [H2]
(iii) Females have a lower return to a strong CV than males [H3]

The survey experiment investigated gender bias in recruitment at the faculty (N=775), where women are underrepresented at the level of Full Professor. The faculty respondents had to evaluate the CVs of hypothetical candidates with the randomly assigned male or female names. The CVs were rated for the position of an Associate Professor in their disciplines. The respondents were asked to create a ranking list taking into account the candidates' competences and hireability. Each participant was given only CVs supposedly submitted by females or only CVs submitted by males not to show that the experiment concerned gender disparities. Each participant evaluated two CVs of the same candidate (with different publication records) and was randomly assigned candidates with two children or no children, to examine the effects of both children and publications the on-faculty's assessments, and whether these effects differ for men and women.

The experiment has shown two phenomena. The first concerned an evaluation of the applicant's competence. The measure of competence was an additive index constructed from the answers to three questions:

(i) To what extent do you consider the applicant as competent for the position?

(ii) To what extent do you consider the applicant to possess the necessary qualifications for the position?

(iii) How qualified do you consider the applicant to be?

The respondent's answer was provided a scale 1-7 where 1 was the lowest score and 7 was the highest score.

The second outcome was that the measure of the applicant's hireability was an additive index constructed of the answers to the following three questions:

(i) How likely is it that you would hire the applicant?

(ii) How likely is it that you would invite the applicant to a job interview?

(iii) What is your assessment of the probability that the applicant will get the job?

Like the previous questions, the respondents answered these questions on a 1-7 scale. The other characteristics that the respondents were asked about were:

– gender (a binary indicator for being female or male),

– age (measured as a continuous variable),

– number of years since obtaining the PhD degree (a continuous variable),

– number of years employed at the current institution (a continuous variable),

– having participated in a hiring committee for permanent positions in the last 5 years (a binary variable; yes or no),

– faculty position (a binary indicator: Full Professor or not),

– and citizenship (a binary indicator for being a citizen in the survey country).

The researchers used regression framework (OLS) to estimate the treatment effects. The experiment showed that, apart from the underrepresentation of women in all fields, the female candidates were viewed as more competent and more hireable than the male candidates. Having children or a stronger CV did not change the overall result. Considering the above biased evaluations of

the equally qualified candidates does not seem to explain the gender gap in academia in the Nordic region.

The authors suggested that the reason might be the fact that the study was conducted in the Nordic region, where institutionalized gender equality norms are observed. These norms could impact, e.g., hiring committees, making them aware of the requirements to hire more female academics. As is widely accepted in academic communities, the respondents could have internalized this requirement and, therefore, gave female candidates more favourable evaluations.

The lack of bias against female candidates in the above study does not rule out the possibility that men have advantages in other aspects of academic life, e.g., in monitoring, or peer-review assessments. Experiments similar to this one provide the ability to examine directly if gender bias exists in evaluating candidates of different gender with all other factors being the same.

Study 2. Delivering gender justice in academia through gender equality plans? Normative and practical challenges (Clavero & Galligan, 2021)

The study of Clavero and Galligan sought to examine the concept of epistemic justice as an aspect by which we can analyse gender inequality in higher education institutions. Using Bourdieu's analysis of power in academia, the study provides an analytical structure that helps to understand the functioning of the systemic gender inequalities in the higher education sector as a problem of epistemic injustice. One clear indicator of the phenomena is the persistence of gender gaps in the full professorship positions. The authors of the study claim that, in order to understand the gender imbalance in academic power, the repeated acts of epistemic injustice against women academics and researchers in academic policies design should be taken into account.

Firstly, the study aims to address the following questions:

(i) To what extent are GEPs in European universities recognizing gender epistemic injustices?

(ii) What type of initiatives are being introduced in this regard?

(iii) What major gaps can be identified in practice?

The study analysed and evaluated recent GEPs approved in the following European Universities:

(1) The University of Nottingham, England (2017–2020);

(2) The Autonomous University of Barcelona, Spain (2019–2023);

(3) The University of Bologna, Italy (2017–2020);

(4) The University of Helsinki, Finland (2019–2020);

(5) The University of Geneva, Switzerland (2017–2020);

(6) The University of Minho, School of Engineering, Portugal (2017–2019); and

(7) The University of Stockholm, Sweden (2017–2018).

These GEPs were selected to represent a variety of European public higher education institutions. The sample institutions shared three common elements:

(i) They provide clear evidence of women academics experiencing obstacles in pursuing their career paths.

(ii) There was a commitment to gender equality at the institutional level. Two of the universities are members of the League of European Research Institutions, an association committed to gender equality. Three universities have been participants of EU-funded projects supporting institutional change by implementation of GEPs and one is a signatory to the UK gender equality accreditation scheme, the Athena Swan Charter.

(iii) The majority of the universities endorsed the European Code of Conduct for the Recruitment of Researchers.

However, the institutions differ in terms of their national legal frameworks and policies; the evaluations of the initial situations and priorities for action; the institutional tradition concerning GEP; and the institutional autonomy in the evaluation of individual merit as well as in the hiring and promotion of academic staff.

Each GEP was interrogated and interpreted alongside two axes in accordance with the previous section. These are:

(i) Opportunities in increasing a collective engagement around gender justice in the organization and challenges connected with it;

(ii) Challenges and opportunities in introducing changes in the gendered culture by changing the norms (formal as well as informal norms) concerning epistemic authority.

This study presents a number of resources and conditions required to ensure gender justice in higher education. Creating a GEP can provide the opportunity for reflexion, the building of consensus, and the investigation of

the gendered norms (both formal and informal) that underpin the assignment of epistemic authority.

In this study, five GEPs include a variety of actions to change the norms and procedures of the institution that concern the assessment of academic merit, as well as cultural values that tend to influence the perception of the "ideal academic" in terms of gender. One of them is the decrease in the negative influence of childcare and other care leaves on recruitment, decisions and promotions, or performance evaluations by not taking into account the periods of breaks in employment resulting from these types of leave (Barcelona, Bologna, Helsinki, Nottingham, and Stockholm). This measure does not concern only women. It is also introduced to encourage more men to share the childcare responsibilities with women. Another action is not focusing on evaluations of academic merit solely on research, but also on the non-research activities like, for example, teaching (Nottingham). This action is also aimed at improving the conditions of career advancement for both men and women.

Teaching roles continue to be feminized and this can contribute to the blurring of the gendered division of academic work through a revaluation of roles. This action also moves away from a quantitative evaluation of merit through introducing standards that require more qualitative assessments, although with limited success in practice. As explained in the GEP from Nottingham: "Promotion success has been greater via the research and teaching pathway where employees have a research focus. This may be in part because criteria regarding teaching, leadership, and citizenship are more qualitative so can be harder to interpret" (University of Nottingham 2017, p. 151).

There are still more women in teaching. The above action can start changing the gendered division of work by providing a new evaluation of roles. This action sets standards requiring more qualitative assessments, although in practice, it was not very successful.

The above explanation suggests that quantitative criteria are still considered more important than qualitative criteria in assessing academic merit. If qualitative criteria are perceived as less accurate, applying them may seem being susceptible of giving the candidate an "easy pass".

Finally, three GEPs have positive action measures in the selection processes (Barcelona, Helsinki, and Nottingham). This type of measure is selecting the

underrepresented gender in the case of all candidates having the same merit and qualifications. Other GEPs include gender targets or quotas in shortlists (Geneva). These steps aim to tackle vertical as well as horizontal segregation in the academic and research environment by facilitating GE in the decision-making processes.

To conclude, while the GEPs surveyed in this study include, for the most part, actions that redefine the application criteria in assessing academic merit, only one GEP (Nottingham) tries to change the criteria according to which merit is defined. It also shows the challenges connected with realization of this action.

Being aware of the limitations of an exploratory study, it nonetheless provides a valuable picture of the gender inequalities in academia as a gender epistemic justice issue and shows how institutions are reacting to this situation.

Study 3. Gender in academic recruitment and selection by Mathias W. Nielsen; In: Gender Sensitive University, (Drew & Canavan, 2021)

The study aimed to find out whether the people involved in the selection processes are guided by unconscious biases. In the first study, the participants were to evaluate the applications of candidates for the positions of laboratory manager (1) or assistant professor (2). In the second study, they created a ranking of applications assuming that all candidates were considered promising in the aspect of the scientific excellence. The third study was based on the bibliometric indices used in Denmark. The study confirms the underrepresentation of women in respect of publications with the highest bibliometric indices mentioned. The author suggests that it is connected with the fact that the majority of professors on the boards of journals and publishing houses are men (76% vs. 24% women).

4.3.1. In the first study by Moss-Racusin et al (2012), 127 professors in American universities rated an identical application for a position as laboratory manager, randomly assigned to either a male or female candidate name. The male applicant was often rated as more competent and hireable than the female counterpart. The male applicants were also offered a higher starting salary and more possibilities of career mentoring.

In the second study, Williams and Ceci (2015) asked 873 US tenured staff to rate narrative summaries of the female and male candidates for the assistant

professorships. Contrary to the results of Moss-Racusin and colleagues, Williams and Ceci (2015) found that participants were twice as likely to rate the female applicant higher than a male candidate who had the same qualifications.

In order to understand the attitudes of those involved in the recruitment and selection processes, it is essential to know the differences in the way the two experiments were conducted. In the Moss-Racusin study, the participants were convinced that they were to provide feedback for a real student, which would help to develop the student's career. In the Williams and Ceci study, the participants were asked to rank three candidates. They knew that the candidates did not exist, and both male and female applicants were described as excellent. The participants of the study were told to make a selection between male and female candidates. Some critics claim that this may have caused a social-desirability bias among the participants.

4.3.2 This section shows how this form of standardisation, apart from its objectives to make performance assessments more transparent and objective, can contribute to retaining the gender inequalities in the academic environment. This is often unintended and happens due to the taken-for-granted organisational routines (Lamont et al 2014; Nielsen 2018).

It is important to note that the Danish bibliometric research indicator has not been created to measure the performance of individual researchers, but for funding allocation purposes. The relative amount of university funding allocated according to this indicator is also relatively small. Regardless of the above, the indicator is frequently used to measure individual performance, in particular, in social sciences and humanities (Mouritzen & Opstrup 2020).

A bibliometric analysis based on a stratified sample of more than 2,000 Danish researchers found the negative gender consequences of such form of standardisation (Nielsen 2017). The analysis compared how many indicator points were assigned to women and men for their peer-reviewed publications. A three-year period was taken into account. In the scientifically and academically adjusted regression models, it was observed that women, on average, received fewer indicator points per publication than their men. When scientific performance was measured by the number of indicator points, as opposed to the number of publications, the average performance gap in favour of men was higher and amounted to 20 per cent compared to 14 per cent in the case of the previous performance measurement method.

The difference was largest in the social sciences. This gender bias did not seem to be caused by differences in citation rates or in the journal impact factors.

Nielsen pointed that a more probable explanation of the bigger performance gap in the case of the Bibliometric Research Indicator is connected with the gender composition of the 68 field specific committees that created lists of prestigious and less prestigious journals and book publishers which was applied for the needs of the indicator. These committees primarily consist of reputable researchers at the Danish Universities. Many of them are full professors, predominantly men. In the period covered by this research, women represented only 24 per cent of these researchers. In practice, this implies that journals covering methods and topics that were not of interest of a relatively homogenous group of male researchers, may have been undervalued by the indicator. As a result, this standardisation exercise aimed to improve the transparency and objectivity of the performance assessments in academia, but ended up introducing a new form of bias.

4.3.3. In this qualitative study, unit heads at a Danish university were asked to identify the most important reasons for underrepresentation of women at the positions of associate professors and full professor. The results confirm the presence of stereotypes perceiving women as too soft for the hard, difficult world of science in the academic environment. According to these stereotypes, the ideal employee should be a competitive, individualist with very few external commitments.

To study symbolic boundaries means 'to analyse how social actors construct groups as similar and different and how it shapes their understanding of their responsibilities toward such groups' (Lamont and Molnár 2002, p. 187). The empirical example shown in the article is based on a qualitative analysis of 24 interviews with department heads at Aarhus University (Nielsen 2017). The department heads were asked to identify the main causes of women's under-representation in the groups of associate and full professors in their departments. Fourteen of the 24 department heads responded by suggesting incompatibilities between the qualities and skills of women researchers and the fundamental requisites of the local research environments. The study found that women lack the self-confidence and here, women were seen as lacking the necessary self-confidence and competitive approach needed to pursue a career in the competitive work settings of the university,

where academics and researchers face high pressure in terms of publication and their career is not secure. What is more, some of the interviewees pointed to the women's need for economic security connected with childcare, their reluctance to travel abroad and lack of interest in managerial positions as the main reasons for gender differences in academic advancement. These statements demonstrate that symbolic gender boundaries are still functioning in some research environments. Stereotypical presuppositions concerning women's qualities and interests are symbolically separated from the characteristics typica for the local research environment. It means that women are shown as "soft" in a hard, competitive scientific environment, where the person who is competitive, not engaged beyond the workplace and competitive is a perfect employee.

Study 4. **Scandinavian approaches to gender equality in academia: A Comparative Study, (Nielsen M.W., 2017)**

This paper presents the comparison of six Scandinavian universities' (two Danish, two Norwegian and two Swedish) GE strategies. The author analyses the different approaches to promotion of women's advancement in research and explains different ways of interpretations of gender influencing the organizations' GE activities. The purpose of the study is to provide a better understanding of the various approaches to policy engagement and GE-concerns causing the national differences in women's representation at the highest academic levels in Denmark, Sweden and Norway. In order to achieve this research objective, the author investigated the activities and initiatives included in the universities' GE action plans and the underlying institutional governance strategies. He also compared the legislative frameworks and policy priorities in the GE work of the universities. This study offers new insights into the different strategies for governing GE issues in Scandinavian universities. It is focused on the national and institutional versions of these GE plans in terms of a) strategies for governing GE-concerns and b) the (feminist) visions of GE on which the different approaches to the topic are based. A brief discussion of the main research results is presented hereunder.

The key questions of the research are:

(i) How do the ways in which priorities are set and strategies for managing GE work at the Scandinavian universities (and in the Scandinavian countries) differ, and what may be the meaning of these differences in terms of women's academic advancement?

(ii) How do the respective GE policy measures applied at the Scandinavian universities (and countries) relate to the four gender frames, and are the applied fames significantly different from one another?

The research adopts a comparative case-study approach, which is a useful method for making systematic juxtapositions while considering only specific aspects of the selected cases (George & Bennett 2005, p. 67). The data collection process in this method is based on a set of questions relevant to each case. In order to answer the above research questions, the study employs a comparative document analysis. The analysis consists of two key strategies used to identify texts containing the GE related information. In the first step, an electronic search was conducted using the GE-related keywords (e.g., "GE action plan", "women in research", "diversity policy", etc.) to access the publicly available materials on the subject of each university and country. As a second strategy, "snowballing" was applied to find additional relevant texts by checking the references of the obtained documents. After the introductory reading of a sample of the potentially relevant documents, 55 documents were selected for further analysis.

Results have shown that the Norwegian and Swedish GE legislations provide clearer structures of responsibility, and their policy efforts take more different approaches into account than the Danish GE legislations. While Norway assumes the lead in terms of legislative and policy-based structural interventions in providing the equal opportunities frame, the Swedish GE gave a lot of attention to rising awareness of how cultural and systemic norms and values started to function as the invisible GE barriers, which suggests the need to revise the existing organisational cultures.

Work with GE at the Scandinavian universities can be perceived as a dual organisational process. On the one hand, active involvement of managers and employees of the faculty and department is needed to achieve the GE targets. On the other hand, it is possible that no steps will be taken at the lower levels of management if such steps are not ordered from above. Therefore, a successful GE work depends on the well-constructed governance strategies, which is interesting to the lower organization levels and presents the GE targets ad attractive. All things considered, the GE activities of the universities have a number of common features in terms of ensuring mentoring, developing careers and leadership and hiring programmes based on incentives. However, there are also a number of interesting differences between the universities. In the Norwegian institutions, the direct policy-based interventions concerning

equal opportunities are underlined; the Swedish universities are the only institutions conducting revisions of their organisational cultures frame, and Danish universities' actions put a stronger emphasis on the fixing the women frame. However, the study has also a number of limitations. It does not answer the question about the varying roles in promoting GE by the bottom-up networks. Because the research results are not conclusive enough, the further analyses should be continued. It is also vital to investigate the long-term efficiency of various types of GE policy in counteracting the inequalities, which shows the need for comprehensive quantitative longitudinal studies concerning different types of GE policy across institutional and national settings.

Study 5. Promoting Diversity but Striving for Excellence: Opening the 'Black Box' of Academic Hiring, (Orupabo e Mangset, 2022)

The article presents an in-depth study of the application of the criteria for assessing quality in recruitment. Through the deep analysis of 48 recruitment cases for permanent academic positions in Norway and 52 qualitative interviews with the recruiters conducting the process, authors emphasize the need to understand how evaluation is inseparable from the organisational process of recruitment. By an ideal type of recruitment process that consists of five different steps, we show that despite the fact that those evaluating applications are aware of the diversity concerns at the first stages of the recruitment process, they still apply the criteria favouring men in the important steps of the process.

In this study, the sample consisted of 48 recruitment processes for associate and full professor positions in history, political science and biology. The study period was from 2013 to 2018 and it was conducted in three universities located in different parts of Norway. One of the universities is slightly more prestigious and international, but it is not a significant difference. The analysed data consist of recruitment reports from the 48 recruitment processes and interviews with 52 members of faculty involved in the recruitment processes in their respective faculties. The interviewees were professors or associate professors and were either department heads or members of one of the recruitment committees. The interviewed group included 19 women and 33 men. The study was conducted in disciplines of history, political science and biology due to the fact that they are traditional

disciplines, and their gender balance ensured a high share of women in lower positions (over 50%), but the professor level was dominated by men (less than 30% women). That situation occurred in all three universities. Heads of each department provided an overview of the recruitment cases that took place during the defined period of time as well as recruitment reports and a list of persons involved in the processes who were contacted for an interview. The study was presented as having no particular emphasis on gender and focusing on the quality of recruitment processes at the universities. It was also essential to explain that the study did not concern the applicant or an institution but the understandings of competence in the hiring process. Out of nine departments, two did not agree to participate as they had too few appointments in the defined time period. We do not believe that the choice to participate or not was caused by a self-selection bias, as both in the participating and not participating departments, the groups of female professors were small and in some of the participating departments, issues related to gender equality occurred. We have also received the authorisation from the Norwegian Centre for Research Data which was necessary to conduct the study.

The conducted interviews were partially structured and took place in the autumn and winter of 2017 and 2018. One interview lasted between one and two hours. The language used during the interviews were Norwegian, and the quotes included in here are translated. All interviews were recorded and transcribed word for word. The interviewees were asked to describe the recruitment processes in which they participated. Such descriptive interviews usually provide more data on practice and operative norms. Focusing on the processual information during the interviews is a tool to avoid social desirability. The interviewees are not so concerned with making good impression when describing processes and events as opposed to giving their opinions. The interviewees were asked about how they understand academic quality and excellence discussed in the recruitment processes as well as whether any other factors had been taken into consideration. At the end, they were openly asked whether diversity was discussed in the context of the recruitment processes, which encouraged the study participants also to express their view on equality measures. The study consisted of reading the scientific committees' evaluations and final ranking of nominees from the latest recruitment processes, and then asking gatekeepers about specific recruitment cases. In this way, the interviewers were able to track various

stages of the process. The descriptive nature of the interview questions provided the opportunity to mention the controversies and problems significant for the study participants avoiding the influence of the field's preconceived notions.

The main focus of the analysis was how committee members defined quality and an ideal candidate for professorship, as well as how their opinions on who is qualified and what that means is linked to diversity. The material was coded under five main descriptive codes that signified the stages of the "recruitment of the ideal candidate". These five stages had several sub-codes, sometimes overlapping, such as 'criteria for inclusion and exclusion of candidates', or 'diversity', that were the basis of the analysis. In the course of analysis, two different logics for selection were discovered. The disciplines differed, especially in terms of formalisation quality measurement, and approach to diversity. However, there was more similarities than differences. On the basis of analyses of interview data as well as official written documentation, a five-step ideal-type recruitment process has been defined: (1) establishing and announcing the vacancy for the position; (2) choosing the committee; (3) appointing the scientific committee; (4) selecting the interviewing and trial lecture committee; and (5) final hiring. These stages vary among the institutions. However, this ideal type of recruitment shows the predominant pattern found in the analysed material but the processes that differ from it are easily discussed on the basis the above model. The list of candidates who will be invited for a trial lecture and an interview, and from which the person to hire will be selected is formed during the first three stages of the interview process. Therefore, the following part will concentrate on stages 1-3. Thanks to the division of the process into stages, the study found that during the earlier stages, the department heads are driven by a logic of inclusion, not the criteria hindering women from applying for the position, as was indicated in the previous research. However, like in other studies concerning institutional discrimination, the authors found that during the further stages of the process (2 and 3) the people involved in the recruitment process use a logic of exclusion. The restricted, formal criteria applied as a result of such approach may put women at disadvantage.

Results confirmed, that despite considering a number of different qualities, the interviewees mentioned the tendency to treat productivity as the most important factor, and to evaluate the other qualities of an applicant only after

ranking the candidates according to their productivity. As mentioned earlier, in steps 2 and 3, quality translates into having publications in the reputed English-language publishing channels. It seems to be an objective criterion, very helpful in the situation when there are many different opinions among the committee members. Research found no indication of gender stereotypes among the committee members in terms of evaluating applicants. This confirms the recent experimental studies on academic recruitment in the Nordic countries (Carlsson et al., 2021). However, according to this study, if the question is about the degree to which the evaluators consider taking diversity issues into account at this stage of the recruitment process, the answer would be they do not. Only the objective criteria of quality were considered legitimate. The diversity concerns were not a part of the search for the perfect candidate for a given position. On the basis of insights from the literature on institutional discrimination (Lund, 2012; Nielsen, 2018), we will now investigate the problem of how narrow criteria in assessing quality and the lack of diversity concerns can put some types of applicants at a disadvantage. Some of the committees considered family obligations in evaluating and rating the candidates, others (very few) did not. Yet, when this aspect is taken into account, it usually is not connected with the institutional procedures or the exclusion problem, but with the personal experience of a given committee member. The majority of the applicants in this study came from foreign institutions. However, the openness or inclusion, that appeared in the first stage of the recruitment process did not extend to all international subjects. The international scholars ranked among the best candidates had a number of articles published in English-language journals and came from western institutions in Europe and the USA. If the gatekeepers assess quality of research production by looking at publications in A-level journals, it may help to 'neutralise' the negative effect of gender or ethnic stereotypes for those who adopt these criteria of quality. Yet, the question is if the institutionalised structures prevent them from meeting these criteria or not. On the one hand, results of this study are optimistic. Previous research had described gender inequality as a result of network ties and closed competition (Husu, 2000; Nielsen, 2016), so that gatekeepers' evaluation of competence and their recruitment procedures create a homogeneous pool of male candidates (Van den Brink, 2011). In contrast to the above findings, our study shows that, in the first stage of the recruitment process, diversity is treated as an asset which helps to ensure a diverse pool

of applicants. In the announcement stage, gatekeepers consider three forms of diversity to be relevant for attracting the best candidates: reaching out to female scholars for gender equality, emphasising potential to attract young and up-and-coming academics, and reaching out to international scholars to respect competition. The qualitative analysis of the logic of inclusion confirms that the diversity initiatives are accepted in the first stage of academic hiring. However, the findings can also be interpreted as pessimistic because they show that in the decisive stages of the recruitment process, the evaluators use narrow quality criteria. So, despite the scientific committees considering a range of qualities while assessing the candidates, the interviews proved that the final ranking of the applicants is based on productivity in English A-level journals. During these stages, diversity issues are scarcely taken into account, which often leads to gender stratification. As previously shown in the previous research, the problem is an evaluating culture that advantages a group of predominantly male academics (Lund, 2012; Nielsen, 2018). Moreover, the findings of this study also show how the narrow criteria for evaluating quality are unfavourable for the international scholars from non-western institutions. So, despite the intention of including gender and diversity concerns in the quality assessment during the first stages of the recruitment process, the narrow criteria for quality used in building the final ranking and conduct selection of applicants is not adequate to discover the strengths of a different candidates. As other scholars have also pointed out (Nielsen, 2018), gatekeepers need to think carefully about the way the official and unwritten expectations for research production, and the valuation of certain fields, influence their analysis of candidate's eligibility for promotion and tenure. The study invites us to answer the question about how and where in the evaluation processes, the guidelines promoting gender balance should find their place in order to be efficient. Paying attention to the initial stage of recruitment turns out to be insufficient. Actions promoting equality must also be interwoven in the more decisive phases of the process. In the described situation of a too narrow focus on the research output, other academic merits in the recruitment and selection processes should be taken into account. The findings of this study encourage us to investigate the way the applicants are evaluated and selected at the universities. The evaluation of a worthy candidate includes considering many factors, that can contribute to repetition as well as a disruption of the patterns causing inequality. The authors of the study believe

that the in-depth studies of the organizational evaluation processes are necessary to discover where in the process, the discrimination patterns can be changed. Now, according to the study, diversity is present in some stages of the process but at some point, it is forgotten and not considered while making the final decisions.

***Study 6*. Gender in Academic Networking: The Role of Gatekeepers in Professorial Recruitment, (van den Brink & Benschop, 2014)**

The authors pointed that research network provides insight into differences between men and women in terms of their professional life and achieving success. Men have more access to higher status sponsors' strategic network partners, and powerful coalitions. For women, networking is a greater challenge due to the family responsibilities (Forret & Dougherty, 2001; Linehan, 2001). Men successfully use their networks for self-promotion, women – for social support. Authors claim that even in the academic environment, the informal and formal networks are essential in building a reputation of excellence. This study investigates the networking practices of these elite scientists, who are considered gatekeepers. The networking practices of gatekeepers play a crucial role in terms of access desirable positions of full professors. A qualitative study was conducted among members of selection committees of seven Dutch universities to get a closer look at the position of so-called gamekeepers. The data includes detailed accounts of how networking is an ordinary part of the recruitment of full professors. The analysis focuses on the accounts of networking practices that help to identify how elites give access to the top positions by informal relations and interactions, as well as how the choice of who to grant this access and who to deny it is approved by these gatekeepers.

The key questions of this research were:

(i) which networking practices do gatekeepers use in recruitment?

(ii) how do gatekeepers practice gender in networking?

(iii) how do these networking practices promote or counteract gender inequalities?

The in-depth interview research method has been used. Interviewees have been asked to describe a specific recruitment process in detail, focusing on the way they identified the potential professorial candidates and who they consulted about the candidates and their reputations.

The findings show that through reproducing of the success model, women support mobilization of masculinities. Women gatekeepers adjust to the men's networking practices that consider the standards and images of the professoriate as masculine. They trust candidates that fit that implicitly rooted model – the masculine models of success. This way, men candidates are perceived as more qualified, while women candidates are considered risky.

In reality, the initial selection of candidates often happens long before a position is formally announced. As a consequence, gatekeepers determine the composition of the candidates' list and if the majority of them are men, women have problems with gaining access to desirable academic networks (homophily mechanism).

Study 7. **Gender equality in Swedish academia: unpacking the toolbox, (Silander, 2023)**

In this study, the ways in which universities seek to remedy workplace inequality is presented by investigating national and institutional measures used to support GE. Bacchi (2009) claimed that a policy holds the very assumptions about the problem that it is meant to solve. Through the data-supported survey interviews with HR personnel and equality coordinators, GE measures used at 14 universities were investigated. By observing this, the frequency and composition of such measures, it is possible to find out more about how universities perceived gender inequalities in academia and how it changed with the national policy and underlying ideas concerning gender differences (Rees, 2005; Squires, 2008).

The analytical categorization scheme based on research conducted as part of the Nordic Centre of Excellence (NORDICORE) research project on GE in the Nordic countries is used in this study. In this project, a categorization was created on the basis of research on GE and diversity policy in organizations. Two kinds of policies have been distinguished: the policies that target individuals and the policies that target structures. The individual-oriented policy includes measures addressed to the members of the underrepresented gender as well as measures that would change staff as well as manager behaviour through training. Structure-oriented policy, on the other hand, includes measures that establish organizational responsibility and target those establishing preferential treatment. In addition, gender assumptions in terms of sameness or differences are addressed.

The study is based on the organizational survey concerning GE and

diversity policies at 14 Swedish universities. The data was collected between 2018 and 2020 as part of the Nordicore project by conducting a data-supported survey at the universities in Sweden, Norway, and Finland. All 17 full-scale Swedish universities (university colleges and universities of fine arts were excluded) had been invited to participate, of which three declined. Due to the fact that the institutional autonomy increased, and the universities' central governance increased, policies and guidelines at the central institutional level were perceived as significant and examined for the investigation. The survey, administered individually either face to face or via Skype/Zoom interviews, included questions concerning universities' formal central-level policies, their measures to promote GE and diversity, and the timing of policies based on a design by Professor Alexandra Kalev and Professor Frank Dobbin's work on diversity management in the United States. The respondents were for the most part HR directors or administrators or equality coordinators. Often, especially in large institutions, several people were asked to provide information about the measures taken at the university level. In Sweden, 26 people were interviewed.

On the basis of the previous research and on three pilot interviews, a number of questions regarding different GE measures were prepared and presented to the respondents. During the first round of interviews, new examples of GE measures appeared and later included in the questionnaire. The individual survey questions represented binary variables, the 'yes' and 'no' questions (with the option to respond 'I don't know' or 'I don't want to answer'). If a respondent selected 'yes', they were asked to define in what period the policy was functioning. Data were collected from the 1990s, when policies' formulation began in the Nordic countries (Husu, 2001).

It is worth mentioning that the collected data are reliable also thanks to the fact that Swedish universities are transparent organizations and information on gender equality activities is often made available to the public.

COMMENTARY

The abovementioned research review shows that both recruitment and selection processes still need an interdisciplinary scientific reflection to be fully consistent with the HR Excellence in Research strategy, including the GEP's policy. In spite of the existing labour laws both at the level of individual countries and the European Union, which prohibit discrimination, there are

still cases of an unequal treatment of applicants in competitions for scientific positions. Recent literature on the subject confirms that gender continues to affect the advancement opportunities in academic institutions, especially when it comes to recruitment and promotion.

The belief that academia is a meritocracy used to be a dogma of university life, based on ideals that in academic institutions academic advancement is the result of a combination of hard work, talent, and merit (Nielsen 2016). Meritocracy means that within academia all individuals should experience the same opportunities for advancement, irrespective of gender.

Insofar as unconscious biases affect a range of evaluation procedures and career decisions, making it easier for men to gain scientific positions, they continue to block scientific advancement for women. Meritocracy implies that access to power and resources is granted to those who deserve it. In practice, recognition of excellence on the basis of pure merit of an academic does not always suffice and may lead to overlooking talents due to the barriers to recognition connected with e.g., systemic bias. In this way, universities and the whole society can lose the potential of many talented individuals. That needs to be changed, and we hope this chapter will help to review existing procedures regarding recruitments and selection.

Unconscious or implicit bias is a result of experience, culture and access to external sources like media, which, through the so-called 'shortcuts' can mislead the audience by reinforcing information that confirms certain expectations.

In order to counteract the inequalities resulting from unconscious bias, institutions shall be monitored and introduce structural change. After identifying the problematic areas, measures shall be defined including a specific timeframe and allocated accountability. Implementation of these measures should be conducted simultaneously with the awareness-raising training for leadership at various levels and as well as for staff in particular, as far as promotion and recruitment committees are concerned. Especially, early career researchers, often employed on short-term, are a challenge in terms of gender equality.

The study confirmed that, despite considering various qualities of the applicants (such as teaching or experience in applying for funding) by the scientific committee, the interviewees admit that there was a tendency to rank applicants according to their productivity and only then evaluate the remaining qualities. The candidate's ranking was complete by then.

In conclusion, it is worth noting that the League of European Research Universities – an association of Europe's most renowned research universities also emphasizes the significant influence of the implicit (or unconscious) biases on the advancement of academic careers of women. The association has published four LERU policy documents on gender issues in academia, which may be useful in the process of bringing university procedures into line with EU requirements. More information can be found under the links hereunder:

"Women, universities and research: excellence without gender bias",

"Gendered research and innovation: Integrating sex and gender analysis into the research process",

"Implicit bias in academia: A challenge to the meritocratic principle and to women's careers - And what to do about it", and

"Family Leave for Researchers at LERU Universities".

These documents can be helpful both in setting the goals and showing the main directions for introducing the GEPs.

With this in mind, organizational efforts in fighting with unconscious biases related to HR processes must be introduced at all university levels, from the highest level of senior management to school leaders and academic staff. The six-step process should apply:

1. secure the support of the highest-level decision makers (university provost or rector);

2. engage decision makers: present the unconscious bias by providing the opinion of the external gender equality champion to persuade the key decisions makers (senior management team/college officers),

3. train the trainers to ensure a broader reach and sustainability by organizing a few-days training programme provided by an external consultant,

4. disseminate the knowledge on unconscious bias through events, present the current research literature on the subject and invite to discussion,

5. cascade the message through unconscious bias briefings provided for senior promotions team, junior and senior promotions committees, recruitment panels, principal investigators and anyone who manages or recruits staff,

6. institutionalise the process and build unconscious bias sessions into recruitment and promotion decision making.

REFERENCES

- Bacchi, C. L. (2009). *Analysing policy*. Pearson Higher Education AU.

- Bielby, W. (2013). *The challenge of effective interventions: Alternative paths to minimizing workplace gender bias*. In: Organizational change, Harvard Business School, Boston, 4–11.

- Carlsson, M., Finseraas, H., Midtbøen, A.H., Rafnsdóttir, G.L., (2021). *Gender Bias in Academic Recruitment? Evidence from a Survey Experiment in the Nordic Region*. European Sociological Review, 37(3), 399–410. https://doi.org/10.1093/esr/jcaa050

- Clavero, S. & Galligan, Y. (2021). *Delivering gender justice in academia through gender equality plans? Normative and practical challenges*. Gender Work Organ, 28, 1115-1132. https://doi.org/10.1111/gwao.12658

- Corrales, C., Herzig, M., & Meixner, B. (2017). *LIBRA Recruitment Handbook Guidelines for inclusive, transparent and unbiased recruitment process*. Zenodo. https://doi.org/10.5281/zenodo.3234400

- Drew, E., & Canavan, S. (Eds.) (2020). *The Gender-Sensitive University: A Contradiction in Terms?* (1st ed.) Routledge. https://doi.org/10.4324/9781003001348

- European Commission, Directorate-General for Research and Innovation, *Science, research and innovation performance of the EU 2022 – Building a sustainable future in uncertain times,* Publications Office of the European Union, 2022, https://data.europa.eu/doi/10.2777/78826

- European Commission, Directorate-General for Research and Innovation, *Science, research and innovation performance of the EU 2022 – Building a sustainable future in uncertain times – Executive summary*, Publications Office of the European Union, 2023, https://data.europa.eu/doi/10.2777/497405

- European Commission, Directorate-General for Research and Innovation, *She figures 2021 – Policy briefs*, Publications Office, 2021, https://data.europa.eu/doi/10.2777/078011

- Farina, S., Iafrate, R., Boccia, S., (2023). *Unveiling the gender gap: exploring gender disparities in European academic landscape*, The Lancet Regional Health - Europe, 34, 2666- 7762, https://doi.org/10.1016/j.lanepe.2023.100752.

- Forret, M. L. & Dougherty, T.W. (2001). *Correlates of networking behavior for managerial and professional employees*. Group & Organization Management, 26, 283–311.

• George, A., & Bennett, A. (2005). *Case studies and theory development in the social sciences*. Cambridge, MA: MIT Press.

• Husu, L. (2000). *Gender discrimination in the promised land of gender equality*. Higher Education in Europe 25: 221–228.

• Husu, L. (2001). *Sexism, support and survival in academia: Academic women and hidden discrimination in Finland*. Sosiaalipsykologian laitos, Helsingin yliopisto.

• Lamont, M., Beljean, S. & Clair, M. (2014). *What is missing? Cultural processes and causal pathways to inequality,* Socio-Economic Review, 12 (3), 573–608, doi.org/10.1093/ser/ mwu011

• League of European Research Universities, https://www.leru.org

• Linehan, M. (2001). *Networking for female managers' career development*. Journal of Management Development, 20, 823–9.

• Lund R., (2012). *Publishing to become an 'ideal academic': An institutional ethnography and a feminist critique.* Scandinavian Journal of Management 28: 218–228.

• Moss-Racusin C. A., Dovidio J. F., Brescoll, V. L., et al. (2012). *Science faculty's subtle gender biases favor male students*. Proceedings of the National Academy of Sciences USA 109: 16474– 16479.

• Mouritzen, P. & Opstrup, N. (2020). *Trickling down to the individual*, in P. Mouritzen and N. Opstrup (eds), Performance management at universities, Palgrave Macmillan, Cham, 2020, 37–56, doi.org/10.1007/978-3-030-21325-1

• Nielsen, M. W. (2016). *Limits to Meritocracy? Gender in Academic Recruitment and Promotion Processes*. Science and Public Policy 43(3): 386–99. DOI: 10.1093/scipol/scv052

• Nielsen, M. W. (2017). *Scandinavian Approaches to Gender Equality in Academia: A Comparative Study*, Scandinavian Journal of Educational Research, 61(3), 295- 318, DOI: 10.1080/00313831.2016.1147066

• Nielsen M. W. (2018) *Scientific performance assessments through a gender lens*. Science & Technology Studies 31(1): 2–30.

• Nielsen, M. W. (2020). *Gender in academic recruitment and selection*. In: Drew, E., & Canavan, S. (Eds.). (2020). *The Gender-Sensitive University: A Contradiction in Terms?* (1st ed.). Routledge. https://doi.org/10.4324/9781003001348

• Orupabo, J., & Mangset, M. (2022). *Promoting Diversity but Striving for Excellence: Opening the 'Black Box' of Academic Hiring*. Sociology, 56 (2), 316-332. https://doi.org/10.1177/00380385211028064

• Osborn, M., T., Rees, M., Bosch, C., Hermann, J., Hilden, A., McLaren, R. Palomba, et al. (2000). *Science Policies in the European Union - Promoting Excellence Through Mainstreaming Gender Equality. Report from the ETAN* (European Technology Assessment Network). Luxembourg: Expert Working Group on Women and Science (Office for Official Publications of the European Communities).

• Powell, S. (2016). *Gender equality and meritocracy. Contradictory discourses in the academy. Dissertation*. Uppsala: Swedish University of Agricultural Sciences.

• Rees, T. (2005). *Reflections on the uneven development of gender mainstreaming in Europe*. International Journal of Feminist Politics, 7(4), 555–574. https://doi.org/10.1080/14616740500284532

• Rivera L. A. (2017). *When two bodies are (not) a problem: Gender and relationship status discrimination in academic hiring*. American Sociological Review 82, 1111–1138.

• *She Figures 2021. The path toward gender equality in research and innovation (R&I)*. Luxembourg: Publications Office of the European Union https://op.europa.eu/en/web/eu-law-and-publications/publication-detail/-/publication/61564e1f-d55e-11eb-895a-01aa75ed71a1

• Silander, C. (2023). *Gender equality in Swedish academia: Unpacking the toolbox*. Journal of Praxis in Higher Education, 5(1), 45–68. https://doi.org/10.47989/kpdc372

• Squires, J. (2008). *Gender in political theory*, Polity Press.

• Teelken, C., Taminiau, Y., & Rosenmöller, C. (2021). *Career mobility from associate to full professor in academia: micro-political practices and implicit gender stereotypes*, Studies in Higher Education, 46:4, 836-850, DOI: 10.1080/03075079.2019.1655725

• Van den Brink, M. (2011). *Scouting for talent: Appointment practices of women professors in academic medicine*. Social Science & Medicine 72, 2033–2040.

• Van den Brink, M. & Benschop, Y. (2014). *Gender in Academic Networking*. Journal of Management Studies, 51, 460-492. https://doi.org/10.1111/joms.12060

- Williams W. M. & Ceci S. J. (2015). *National hiring experiments reveal 2:1 faculty preferences for women on STEM tenure track*. Proceedings of the National Academy of Sciences USA 112: 5360–5365.

CHAPTER 7

INTEGRATING THE GENDER DIMENSION INTO RESEARCH AND TEACHING
Marina Appiou Nikiforou, Andri Christoforou

INTRODUCTION

Knowledge is created through research and transferred through education, most commonly within higher education institutions (HEIs). Research within social sciences and humanities, however, illustrates that knowledge cannot be separated from those producing it or from the dominant societal norms of each socio-cultural context. Scientific research is not free from gender stereotypes and biases. Research, therefore, and consequently, teaching and other academic endeavours have the potential to affect men's and women's lives significantly and to create or exacerbate gender inequality.

A prominent example often used to highlight the effects of gender-biased knowledge is the diagnosis and treatment of heart attacks (Maserejian, et al., 2009). For a long time, heart attacks have been linked to men, particularly elderly men. This has put women to a great disadvantage: women who visit the emergency room with the same symptoms as men are more likely to be diagnosed with panic disorder. While a man experiencing chest pain is likely to be referred to a cardiologist, a woman with the same symptoms is more likely to be prescribed psychoactive drugs and sent home, a phenomenon resulting in women accounting for the majority of heart disease-related deaths. Osteoporosis, autoimmune diseases, chronic pain and certain mental health issues – such as depression – are some other examples of conditions that have been linked to one particular sex, resulting in underdiagnosis or misdiagnosis of the condition to a significant portion of the population (Bertakis, et al., 2001; Hoffmann & Tarzian, 2001).

Universities and other research and educational institutions have,

therefore, a paramount role to play in generating and transferring knowledge that is free from gender biases and takes into consideration the needs of people of all genders. Mainstreaming gender, not only in research, but also in teaching and other knowledge-transfer activities becomes imperative, especially in areas where the dimension of gender has been traditionally neglected.

DESCRIPTION OF TOPIC AREA

Gender-sensitive research

There are three ways in which sex and gender can be integrated into scientific research (Mihajlović & Hofman, n.d.): (a) through gender equality in research teams, (b) through gender-specific research, where gender is the field of study itself, and (c) through gender-sensitive research, where sex/gender is considered at every stage of the research process. This chapter focuses on the third way, i.e., gender-sensitive research. A gender-sensitive approach to research means that any kind of gender/sex differences – social or biological – are taken into consideration in the whole research process. The integration of the gender dimension improves not only the scientific rigour, but also the findings' relevance to diverse populations with different needs and characteristics. Integrating the gender dimension in the research content requires the consideration of sex and gender aspects throughout all stages of the research cycle: (a) research design including priorities, the formulation of research questions and hypotheses, and the selection and development of methodologies; (b) data collection; (c) data analysis; (d) reporting and disseminating research results, including transferring them to markets as innovations and products.

The establishment of research priorities may be hampered by a variety of contextual factors, which may influence the gender dimension(s) of the topic under investigation, leading to missed opportunities for new scientific discoveries. Funding agencies and researchers need to identify and account for these factors that determine whether the study should make a distinction between women and men and how the findings might contribute to gender (in)equality. Even in disciplines, such as STEM (Science, Technology, Engineering, and Mathematics), which do not study humans directly and are commonly viewed as gender-neutral, researchers must endure that their theoretical framework takes into account and make clear the likelihood of differential

gender relations to the research. For example, some issues to consider are: By whom is the research agenda decided and why? Whose needs and interests are being met by the research? Who will use the knowledge that will be generated? Who will profit from the research, and how?

Researchers should be aware of the current state of knowledge in their field of study regarding the subject at hand, as well as what would be unknown if sex and gender were not taken into account. The most up-to-date data on sex and gender must serve as the foundation for the theoretical framework and notions. They should also be aware of the extent to which assumptions about sex and gender are supported by facts or by gender stereotypes. Researchers should select the most appropriate methodologies in order to ensure that sex and gender differences and potential interactions between sex, gender, and other factors are collected, analysed throughout the research steps, and included in the final publication. Overall, researchers should also reconsider how they articulate their own theories and concepts about sex and gender and decisions regarding the integration of sex or gender into research objectives should be evidence-based.

Sex and gender should also influence how data are collected and analysed. Men and women may have different needs and expectations and their responses may be influenced by normative expectations and stereotypes. As an example, in social sciences research, the perceived gender of the researcher may interfere with the answers provided (Letherby, 2003). In terms of analysis of data results, researchers should be aware of the interaction between sex and gender if relevant, as well as the intersection of gender with other identities such as age, race, socioeconomic status, place of residence, language, and religion. Researchers should make sure that any pertinent gender differences that emerged during the course of the research are included in the statistics, tables, figures, and descriptions that are given; they should also disclose any instances in which sex differences are not found in the analyses. Researchers must be aware that gender is a social construct that is pervasive in science, health/medicine, and engineering as well as a linguistic, cognitive, and analytical category. It is essential for the researcher to consider cultural attitudes, especially those "taken-for-granted," undetectable presumptions that influence study. Researchers can also think about publishing articles, chapters in books, etc. on results relating to gender in addition to mainstream research journals, institutes, departments, and journals that focus on gender.

Gender-sensitive teaching

Research shows that gender stereotypes and biases – either conscious or unconscious – have a pervasive effect in the transmission of knowledge and skills through a number of channels including curriculum design, teaching and public outreach. The international literature points to multiple and diverse ways in which the faculty's interactions with students are influenced by gender. Specialized trainings and capacity-building programs can enable educators at all levels to identify their own biases, reflect on their ideas and practices and ultimately take action to minimize potential prejudices and discrimination and ultimately promote gender equality and respect to diversity. Gender differences should be taken into account both during the development of curricula and during lectures (Mihajlović & Hofman, n.d.). University education should address and accommodate everyone's needs, while at the same time, challenge students' biases and stereotypical beliefs. This can be achieved by a number of actions aiming at integrating the gender dimension in the class content, such as providing reading recommendations that take a gender-sensitive approach and giving assignments requiring students to study and reflexively think about the gender dimension of the topic. Gender-sensitive teaching is not only more inclusive but it stimulates critical thinking, enhances scientific excellence and creates the backdrop for a more equal society. Several toolkits and guides are already available, providing ideas and good practices of integrating the gender dimension in the teaching of various subjects within different disciplines (See Useful Resources).

Gender-sensitive language

Both gender-sensitive research and gender-sensitive teaching require the use of gender-sensitive language. Gender-sensitive language is inclusive and free from stereotypes and biases. It promotes equality and diversity, ensuring that everyone is represented in research and teaching content. As the use of gender-sensitive language means different things for different languages, many HEIs around the world have already established guidelines to assist faculty, researchers, administrators, and students adopt a more inclusive language.

SUGGESTED METHODS OF INVESTIGATION WITH EXAMPLES

Research methods that may be employed in studies related to the integration

of the gender dimension into research and teaching, include but are not limited to:

– Surveys
– Semi-structured in-depth interviews
– Focus groups
– Case studies
– Desk research/ content analysis
– Participatory Action Research

Study 1: Steps towards the Integration of the Gender and Sex Dimension in R&I: The Case of a Public University

This study aims to explore the impact of EU policies on the integration of the gender dimension in research at a public Portuguese university. To achieve this objective, a mixed approach was used, consisting of three phases: (a) interviews with key institutional actors; (b) qualitative analysis of institutional documents; and (c) quantitative analysis of secondary data regarding the scientific production of the institution. More specifically, the findings of this study are based on nine semi-structured, face-to-face interviews with directors of institutional research units, on content analysis of the main institutional documents, and on a quantitative analysis of the scientific publications produced by the university incorporating a 'gender/sex dimension' through databases such as Scopus and Thomson Reuters Web of Science (WoS).

The findings of the interviews show that there was a confusion among research units' directors around the concept of 'gender/sex dimension', as well as a lack of knowledge and awareness of the benefits associated with the integration of gender/sex dimension in research. Although several initiatives were developed to increase the gender awareness within the research community of the university – mainly as part of the current institutional GEP – gender equality remains absent from all strategic documents of the university, including the Strategic Plan. The analysis of scientific outputs shows that in 2009, the percentage of publications with this dimension reached 1% of the total of published documents. The number of the respective publications has gradually increased to 3% of the total annual publications in 2020 and in 2021. The quantitative data reflect, not only the findings obtained through interviews, that is, confusion and lack of knowledge of the benefits

of integrating the "gender/sex dimension" in research, but also the lack of gender equality issues in institutional strategic documents besides the GEP.

Nonetheless, the authors claim that the GEP implementation has brought, at least, some visibility to the issue. It is argued that the development of implementation of the institution GEP "marks the transition to an approach in which the promotion of gender equality is mainly fostered through processes of cultural and institutional change - moving closer to the 'fix the institution' approach". Further research is needed in order to assess the impact of ongoing efforts and initiatives in the area in the context under investigation. While the present study indicates that progress in integrating the gender/sex dimension in research is slow and challenging, the authors argue that there is still a lot of potential for improvement.

This study provides examples for diagnosis and evaluation.

• **Source**: Jordão, C. e Lopes, B. (2022). *Steps towards the Integration of the Gender and Sex Dimension in R&I: The Case of a Public University*. Education sciences, 13(1), 35–35. https://doi.org/10.3390/educsci13010035

Study 2: **Diversifying diversity: Inclusive engagement, intersectionality, and gender identity in a European Social Sciences and Humanities Energy research project**

The present article is based on a case study, analysing the attempts within the Horizon 2020 project SHAPE ENERGY ("Social Sciences and Humanities for Advancing Policy in European ENERGY") to implement an inclusive engagement approach within the Social Sciences and Humanities (SSH) interdisciplinary research in the areas of energy and climate research. The project's main aim was the development of a European energy-SSH platform, where researchers, businesses, policymakers, NGOs, and citizens could share their viewpoints on energy policy discussions.

The dimension of gender was included in the project's planning and approach, including an analysis of gender considerations that would facilitate broader engagement. More specifically, the gender dimension was included in the implementation by encouraging women's participation in science and research; addressing both men's and women's needs; and studying gender to gain a better understanding of the role of gender in science and research.

The study utilized the methodology of data triangulation by analysing data from the following sources: (a) documentary and oral accounts from

project management describing the ways in which the project promised to address and carry out strategies related to gender issues, (b) data from 17 multi-stakeholder city workshops, and (c) an e-mail survey sent out to all project partners. The findings of the present study indicate a significant diversity in the comprehension of gender and its integration in the project. The treatment of gender often simplified to mere quantification of male and female participants, overshadowing broader considerations like age, location, expertise, and more. The authors argue that strategies for gender equality should encompass these broader viewpoints to adequately tackle the ways different intersectionalities can contribute to and enhance inclusive engagement.

This study provides an example of evaluation.

• **Source**: Søraa, R.A., Anfinsen, M., Foulds, C., Korsnes, M., Lagesen, V., Robison, R. e Ryghaug, M. (2020). *Diversifying diversity: Inclusive engagement, intersectionality, and gender identity in a European Social Sciences and Humanities Energy research project*. Energy Research & Social Science, 62, p.101380. https://doi.org/10.1016/j.erss.2019.101380.

Study 3: Gender in research content: Experiences from an Austrian programme

One of the main goals of gender equality policy in science and research at the European level is to integrate a gender dimension into research content. A review of gender equality policies in European Research Area (ERA) countries shows that several countries have introduced gender criteria in research funding or supported the consideration of gender in research content through specific programmes. Yet, although policies are in place, there is hardly any evidence on the effects of the integration of the gender dimension into research content.

The paper refers to a review of projects funded within the programme FEMtech research projects in Austria. The analysis is based on research proposals, self-description of projects and qualitative interviews with project leaders and gender experts involved in the projects. These empirical findings are contrasted with an ideal scenario of the integration of the gender dimension in research projects. This comparison depicts that most research designs do not support the ideal scenario. There are several reasons for deviation, e.g., because gender concepts used are not explicated, because

gender expertise is restricted to specific partners or because of a lack of reflection of results or research process.

On the other hand, good practice cases also come up in the analysis. Based on these cases, recommendations are formulated for supporting the gender dimension in applied research. On the one hand, they focus on strengthening the gender dimension in research content and, on the other hand, on strengthening a reflection of the research process. Both aspects are identified preconditions for a sustainable integration of gender in research at an individual as well as an organisational level. Also, there appears to be a need not only to embed the gender dimension in the research content but also to formulate clear responsibility for it.

The study proposes the following recommendations for promoting the integration of the gender dimension in applied research:

Differentiate between gender expertise and gender competence by providing clear definitions;

Raise the value of gender competence and gender expertise right from the proposal phase throughout the project;

Clarify the role and function of gender experts;

Create space for reflection and increase the visibility of the learning processes with regard to gender (e.g. through specific workshops or in the reporting processes); and

Utilize more resources for interdisciplinary projects;

This study provides an example of diagnosis.

• **Source**: Wroblewski, A. (2016). *Gender in research content: Experiences from an Austrian programme*. Paper presented at the 9th European Gender Summit, Brussels – 8/9th November 2016. Available at: https://gender-summit.com/attachments/article/1346/Wroblewski_paper_GS9Eu.pdf

Study 4: Integrating topics of sex and gender into medical curricula-lessons from the international community

The integration of sex and gender into medical curricula is considered critical for the optimization of patient care. The article is based on the proceedings of "2015 Sex and Gender Education Summit", held at Mayo Clinic in the United States. A group of international scientists and educators from prominent universities participated in a panel to discuss their experiences in developing and implementing training programs in the principles of sex- and gender-based

differences in health and disease. The panel focused on best practices from medical schools in Germany, Sweden, Canada and the United States.

In Germany, the development of a new modular medical curriculum in 2010 at the Charite Medical School resulted in the creation of the interactive, web-based eLearning platform "eGender Medicine", targeting postgraduate students, clinicians, and researchers. In Sweden, the Center for Gender Medicine at Karolinska Institutet established the web-based educational course 'Future Challenges for Health Care: Gender Adds Value', which acts as a platform for international collaboration in the area. In Canada, the Canadian Institutes of Health Research offer one-week summer courses to graduate students and postdoctoral fellows with faculty mentors in both qualitative and quantitative methodologies covering sex differences, embodiment, and masculinities. The Texas Tech University Health Sciences Center offers the "Online Continuing Medical Education and Certificate Program in Sex and Gender Specific Health", after a bottom-up approach that assessed the needs of various stakeholders.

One common theme emerging from the panel discussion was that, while an individual or a key group of individuals that act as "change agent(s)" is necessary, real change can only be achieved with the involvement of institutional leadership along with the commitment of financial and structural resources. The article provides methodologies and resources that can be adopted and adapted to specific needs of other institutions and learning situations.

The examples provided can be used as interventions, as well as for monitoring and evaluation purposes.

- **Source**: Miller, V. M., Kararigas, G., Seeland, U., Regitz-Zagrosek, V., Kublickiene, K., Einstein, G., Casanova, R., & Legato, M. J. (2016). *Integrating topics of sex and gender into medical curricula-lessons from the international community*. Biology of sex differences, 7 (Suppl 1), 44. https://doi.org/10.1186/s13293-016-0093-7

Study 5: **Integrating gender perspectives on teaching and subject content at a natural science university in Sweden.**

This article describes an action research/intervention study aiming at integrating gender and norm critical perspectives into teaching and subject content at a predominantly natural science university in Sweden with an uneven

gender balance of students in the education programs. Rather than aiming at a 50-50 distribution of gender in classes, the study utilized the concept of norm critical pedagogy, aiming to make visible the norms in teaching and in society in general, and to question these norms and the power relations implicit in them.

The main target of the intervention were the university teachers. The study design consisted of the following steps:

1. investigation of teachers' and students' experiences, attitudes and needs related to gender equality in education, through focus groups and surveys;

2. adaptation of the study in the existing university structure;

3. implementation of intervention, i.e., a course consisting of four half-day workshops filled with discussion seminars, assignments and literature reading targeting professors;

4. evaluation of outcomes and recommendations for the future; and,

5. presentation of the study results to decision-makers at the university.

This case study illustrates that it is possible to integrate gender perspectives in teaching and subject content at a natural sciences university and also to move the discussion about what constitutes gender equality from a perception of "numbers" to a much more complex discussion about how norms influence teaching and study environments. The course evaluation and follow-up interviews show that the interventions have been successful in increasing gender awareness, in supporting individual teachers, and in providing a platform for discussion and collaboration. A very important aspect of integrating gender in teaching content that this study highlights is that the work of engaged, but isolated individuals is ineffective in creating change. Rather, the commitment and engagement of the leadership to organisational change and gender equality is key. Creating gender equality requires a change in the organization and as such, it needs to be well integrated into existing structures as well as internally funded to have a positive long-term change effect.

This study provides an example of intervention.

• **Source**: Powell, S. and Ah-King, M. (2013). I*ntegrating gender perspectives on teaching and subject content at a natural science university in Sweden*, International Journal of Gender, Science and Technology, 5(1), 52–61. Available at:
https://genderandset.open.ac.uk/index.php/genderandset/article/view/271

Study 6: **Strategies to introduce gender perspective in Engineering studies: a proposal based on self-diagnosis**

This paper presents a framework for inclusion of gender perspective in engineering courses. The framework was developed in two phases, as follows: (a) Introduction of different educational innovation projects, and (b) Implementation of a co-creation workshop with professors who applied a self-diagnosis technique in their own practices.

More specifically, the gender perspective was introduced in three subjects of the engineering courses at the University of Salamanca (Software Engineering) and the University of La Laguna (Web Design and Human-Computer Interaction). Both innovation projects were used to identify good practices and to design a proposal of several tools to support teachers in their classrooms. The identified good practices and tools were subsequently validated with professors through a co-creation workshop (Phase II). The participants of the co-creation workshop were 12 professors from various disciplines enrolled through the teacher training program at the University of Salamanca. None of the participants had previously used co-education in their courses. The instruments used in the workshop were a Canvas model for the design and a rubric for the assessment of their practices. Consequently, a set of recommendations emerged, and they were organized into a framework to include the gender perspective in an engineering course.

The framework proposed in this work provides a set of practical guidelines and a set of tools that can be directly used by the engineering professors to transform their subjects from a co-educational point of view (see https://ieeexplore.ieee.org/document/9125289).

This study provides an example of intervention.

• **Source**: González-González, C. S., García-Holgado, A., & García-Peñalvo, F. J. (2020). *Strategies to introduce gender perspective in Engineering studies: a proposal based on self-diagnosis*. In 2020 IEEE Global Engineering Education Conference (EDUCON), (27-30 April 2020, Porto, Portugal) (pp. 1884-1890). Doi: 10.1109/EDUCON45650.2020.9125289.

Study 7: **Introducing and Evaluating the Effective Inclusion of Gender Dimension in STEM Higher Education**

The objective of this study was to develop a guide of recommendations to be used by all the teaching staff at the Universitat Politècnica de Catalunya

in Spain for the effective integration of the gender dimension in teaching in STEM (Science, Technology, Engineering and Mathematics) fields through a pilot project named Gender Dimension in Teaching (GDT).

The participants were selected through an open call to all faculty and students for participation in the project. The sample consisted of 41 teachers and 548 students. The study utilized questionnaires to assess the participants' attitudes, perceptions, and prejudices, as well as a final assessment questionnaire. The results indicate that only 36% of teachers believed that their subject was gender relevant, while 90% did not integrate gender in any way in their subject. Only 24 % of students had any female references in their classes, while 57% of female students claim to have evidence for discriminatory treatment by teachers. The results also show that 34% of the female students do not feel comfortable participating in class, compared to 11% of the male students.

Most participating women were prepared to begin disseminating the knowledge gained, whereas men were prepared to a lesser extent. Understanding gender differences in motivation to perform outreach could lead to enhanced engagement of both men and women in outreach and service-learning activities. The results of this study also show that the recommendations guide should have a simple, direct, short and very practical format, with the objective to facilitate its use at the time of designing or modifying subjects. Last but not least, the development of a network of contacts between teachers adds significant value to knowledge exchange and future collaborations. The authors believe that this methodology, which is based on a cooperative project, can be replicated in other centres and institutions in order to reach a consensus among the participating members and serve as a reference for institutional change.

This study provides an example of diagnosis and intervention.

- **Source**: Peña M, Olmedo-Torre N, Mas de les Valls E, et al. (2021). *Introducing and Evaluating the Effective Inclusion of Gender Dimension in STEM Higher Education.* Sustainability 13(9). MDPI AG: 4994. DOI: 10.3390/su13094994.

Study 8: **Integrating the gender dimension in teaching, research content & knowledge and technology transfer: Validating the EFFORTI evaluation framework through three case studies in Europe**

The study is an application of the EFFORTI evaluation framework to three

empirical case study interventions that aim to integrate the gender dimension in tertiary education and research content. More specifically, the present study is a comparison of EFFORTI case study interventions in three universities in Austria and Spain. The selection of case studies followed the logic of theoretical sampling. Case studies aimed to integrate the gender dimension into teaching and R&I focusing on different points of the innovation cycle (e.g., from curriculum design to research and technology transfer) in tertiary education. Each case study was comprised of documentary analysis and between 4-12 semi-structured interviews with policy-makers, programme managers, practitioners and beneficiaries.

A comparative analysis of the three case studies resulted in the identification of best practices for integrating the gender dimension in teaching and research content. These best practices are useful in informing future actions, as well as evaluations of such interventions that aim to integrate the gender dimension in teaching and research. The findings indicate that the design of such interventions, particularly the definition and operationalisation of the gender concept, legal status, and resources, is key to achieving desirable results. Top-level institutional commitment and recognition of gender studies, along with the support of a gender competence unit, are essential for effective implementation.

Recommendation: This study provides examples of interventions and evaluation mechanisms.

- **Source**: Palmén, R., Arroyo, L., Müller, J., Reidl, S., Caprile, M. and Unger, M (2020). *Integrating the gender dimension in teaching, research content & knowledge and technology transfer: Validating the EFFORTI evaluation framework through three case studies in Europe*. Evaluation and Program Planning, 79, https://doi.org/10.1016/j.evalprogplan.2019.101751.

CONCLUSIONS

The European Commission is committed to advancing gender equality in research and innovation. Through Horizon Europe, the current funding programme for research and innovation with a budget of €95.5 billion, the Commission continues to reaffirm its commitment by establishing Gender Equality Plans as an eligibility criterion for participation in the programme. The Commission's requirement for institutional Gender Equality Plans has resulted in an immense mobilization of universities and research organizations across

Europe towards mainstreaming gender into their strategic priorities. The mandatory process-related requirements related to GEPs (i.e., being a public, formal document, dedication of resources by the management, inclusion of data collection and monitoring, and provision of training and capacity-building) ensure that robust action is taken for the recognition, promotion, and embedment of gender as a cross-cutting issue in both research and teaching.

REFERENCES

• Barbieri, B., Carboni, P., Cois, E., Lovari, A. & Sois, E. (2021). *Guidelines for gender sensitive communication in research and academia. Developed in the framework of the project "SUPERA - Supporting the Promotion of Equality in Research and Academia"*. Available at: https://www.superaproject.eu/wp-content/uploads/2021/07/D8.2-TAILOR-MADE-guides-for-gender-sensitive-communication-in-research-and-academia-v.1.1-.pdf

• Bertakis, K. D., Helms, L. J., Callahan, E. J., Azari, R., Leigh, P., & Robbins, J. A. (2001). *Patient gender differences in the diagnosis of depression in primary care*. Journal of women's health & gender-based medicine, 10(7), 689–698. https://doi.org/10.1089/15246090152563579

• European Institute for Gender Equality (2023). *Gender Equality in Academia and Research - GEAR tool. Integration of the sex/gender dimension into research and teaching content.* Available at: https://eige.europa.eu/gender-mainstreaming/toolkits/gear/integration-gender-dimension-research-and-teaching-content

• European Institute for Gender Equality (2019). Toolkit on Gender-sensitive Communication. Available at: https://eige.europa.eu/publications-resources/publications/toolkit-gender-sensitive-communication?language_content_entity=en

• Hoffmann, D., & Tarzian, A. (2001). *The Girl Who Cried Pain: A Bias against Women in the Treatment of Pain*. Journal of Law, Medicine & Ethics, 29(1), 13-27. DOI: 10.1111/j.1748- 720x.2001.tb00037.x

• Letherby, G. (2003). *Feminist research in theory and practice*. McGraw-Hill Education (UK).

• Maserejian, N. N., Link, C. L., Lutfey, K. L., Marceau, L. D., & McKinlay, J. B. (2009). *Disparities in physicians' interpretations of heart disease symptoms by patient gender: results of a video vignette factorial experiment*. Journal of women's health (2002), 18(10), 1661–1667. https://doi.org/10.1089/jwh.2008.1007

• Mihajlović Trbovc J. & Hofman, A. (n.d.) *Toolkit for Integrating Gender Sensitive Approach into Research and Teaching. Developed in the framework of the project "GARCIA – Gendering the Academy and Research: Combatting Career Instability and Asymmetries"*, Available at:
https://eige.europa.eu/sites/default/files/garcia_toolkit_gender_research_teaching.pdf.

• Puy, A., Pascual Pérez, M. & Forson, A. (2016). *Manuals with guidelines on the integration of sex and gender analysis into research contents, recommendations for curricula development and indicators. Developed in the framework of the project "GENDER-NET - Promoting Gender Equality in Research Institutions and Integration of the Gender Dimension in Research Contents"*. Available at:
https://eige.europa.eu/sites/default/files/d3.11_manuals_with_guidelines_on_the_integration_ of_sex_and_gender_analysis_into_research.pdf

• SAGE (n.d.). *Embedding Gender Knowledge. Developed in the framework of the project "SAGE: Systemic Action for Gender Equality"*. Available at:
https://www.sage-growingequality.eu/web/assets/media/tools/embedding_gender_knowledge.pdf

Other useful resources: Integration of the gender dimension into Research

• European Commission, Directorate-General for Research, and Innovation
https://data.europa.eu/doi/10.2777/316197
A policy report providing methodological tools and examples from 15 "Horizon 2020" projects integrating the gender dimension into key research and innovation areas such as health, artificial intelligence and robotics, energy, transport, marine science and climate change, urban planning, agriculture, fair taxation and venture funding.

• Gendered Innovations, Stanford University
http://genderedinnovations.stanford.edu/fix-the-knowledge.html
Case studies in diverse research fields related to engineering, science, the environment and health and medicine.

• Institute of Gender and Health, The Canadian Institutes of Health Research
https://www.cihr-irsc-igh-isfh.ca/?lang=en
Online training modules, guidelines, tools, and resources to help researchers and reviewers better account for sex and gender in health research.

• Kilden, Research Council of Norway

https://kjonnsforskning.no/sites/default/files/what_is_the_gender_dimensi
on_roggkorsvik_kil den_genderresearch.no_.pdf

A series of case studies examining how gender is relevant to different disciplines and areas of research. The handbook provides examples, ideas and guidelines for researchers even within fields where gender perspectives do not seem relevant.

• Yellow Window Project

http://www.yellowwindow.com/genderinresearch

A series of case studies illustrating how gender-sensitive research can be applied to the fields of health; food, agriculture, and biotechnology; nano-science and nanotechnologies; energy; environment; transport; socio-eco-nomic science and the humanities; science in society and specific activities of international cooperation.

Other useful resources: Integration of the gender dimension into Teaching

• Baltic Gender, *Gender-sensitive Teaching – An introduction for teaching staff in STEM* .
https://oceanrep.geomar.de/id/eprint/50001/1/BG_D4.2_Gender-
Sensitive%20Teaching.pdf
Guidelines for eliminating gender stereotypes and creating a positive and encouraging working environment.

• EGERA, *Good practices on introducing gender into curricula*.
https://repository.ubn.ru.nl/bitstream/handle/2066/181606/181606.pdf?seq
uence=1&isAllowed=y
A collection of 23 good practices from six European universities in main-streaming gender knowledge in academic curricula, predominantly in Social Sciences and Humanities.

• *GEARING ROLES*, Gender in the curriculum self-assessment and diagnostic checklist.
https://gearingroles.eu/wp-content/uploads/2020/05/2002-Gender-
mainstreaming-in- education.pdf
A checklist that allows stakeholders to self-assess the extent to which they already mainstream gender in their curriculum. It also outlines key ideas and actions for potential obstacles.

• UNESCO, A Guide for Gender Equality in Teacher Education Policy and Practices. https://unesdoc.unesco.org/ark:/48223/pf0000231646

A practical tool for promoting a gender-responsive institutional culture. It seeks to strengthen the capacity of teacher educators, managers and student teachers to transform their practices effectively through innovative participatory approaches.

• Women's and Gender Research Network NRW, Gender Curricula
https://www.gender-curricula.com/en/gender-curricula

UA model database including gender-sensitive curricula for 55 subjects / disciplines. The database contents are updated regularly.

CHAPTER 8

MEASURES AGAINST GENDER-BASED VIOLENCE, INCLUDING SEXUAL HARASSMENT IN ACADEMIA
Jolanta Klimczak

INTRODUCTION

Gender-based violence (GBV) persists throughout the European Union (EU) and is predominantly caused by social inequality and male dominance: a third of women have suffered from sexual harassment and physical or sexual violence, frequently from intimate partners, while around a third of women who encountered sexual harassment experienced it at their workplace (European Commission 2023, 68). 4% of registered victims of trafficking for sexual exploitation are women and children (European Commission, 2023, 10). Approximately 16% of women know someone within their circle of friends and family who has experienced online harassment or cyberbullying (European Commission, 2023, 7). The number of women who have undergone female genital mutilation in Europe amounts to at least 600,000 (EU European Council, 2023). In 2020, 788 women were recorded by Eurostat as victims of homicide.

According to the European Institute for Gender Equality, the estimated annual cost of gender-based violence in the EU is EUR 366 billion, of which as much as 79% are acts of violence against women (EIGE 2021).

The primary cause of violence against women is the historically entrenched structural inequality between genders. The structural nature of violence implies that violence against women is a consequence and a constituent part of social hierarchies and gender orders, perpetuating these inequalities. It represents one of the fundamental social mechanisms through which women are relegated to a subordinate status as compared to men. Gender-based violence against women is a form of discrimination that considerably restricts their ability to enjoy rights and freedoms on an equal footing as men (UN Committee on the Elimination of Discrimination against Women 1993).

The concept of gender-based violence has evolved and is now frequently applied as a framework umbrella to comprehend the intricate network of potential exposure to various forms of gender-based violence and harassment. Gender-based violence encompasses a range of behaviours, including rape,

sexual coercion, blackmail, indecent jokes, the promotion of pornographic content, insinuations of gender-based inappropriateness within a specific field of study, as well as whistling and sexual comments.

A spectrum of violent behaviours and attitudes influenced by gender encompasses:

• **Gender harassment**: it means harassment based on a person's sex without sexual connotations. Examples include comments that belittle, hate speech, exclusion, silencing, or stereotypical assumptions.

• **Sexual harassment**: it means unwanted conduct with sexual overtones, such as touching, comments about someone's appearance or body, stalking, the sending of sexually explicit images, or sexual jokes (Council of Europe 2023).

Generally, we can define GBV as:

physical and psychological violence, sexual violence, economic and financial violence, gender-based harassment, stalking, and organizational or environmental harassment in both online and offline contexts. GBV also includes forms of violence that may not be recognized as such but are seen as abuse or violation. (Fajmanowa et al. 2021, 14).

Combating gender-based violence is based on several core policies and legal regulations of the United Nations, the European Union, and the Council of Europe. The 1979 Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) is a key legal document promoting gender equality, which prioritizes addressing gender-based violence. This Convention prohibits discrimination based on gender and requires States Parties to take action to eliminate violence against women and protect their human rights. The CEDAW Committee's General Recommendations No.19 (1992) and No.35 (2017) provide detailed recommendations, including legal measures, prevention, protection, prosecution and punishment, reparations, and monitoring. In 2000, in response to the Beijing Declaration and Platform for Action (1995), the United Nations adopted Resolution 1325 on gender-based violence to raise awareness and stimulate state action. The resolution titled Women's Safety, International Peace, and Security calls for protecting women and girls in conflict situations. International regulations of the United Nations focus on prevention, i.e., removing the root causes of violence against women; and protection, i.e., providing necessary services and support to victims of violence and accusing perpetrators and holding them legally responsible. It focuses primarily on women and girls (Mergaert et.al. 2023, 2-3).

In the European Union, the most important legal document protecting human rights, including the right to life, freedom, non-discrimination, protection of personal security and physical and mental integrity, is the Charter of Fundamental Rights of the European Union. The following address these issues in detail:

• Council Directive 2000/43/EC, which aims to apply the principle of equal treatment between persons, irrespective of racial or ethnic origin. This directive expressly prohibits discrimination based on race or ethnic origin.

• Council Directive 2006/54/EC, the purpose of which is to establish the principle of equal treatment in employment and occupation. This directive prohibits gender discrimination in the workplace and can also be used to combat gender-based violence.

• Council Directive 2012/29/EU of the European Parliament and of the Council, which aims to establish minimum standards of protection and support for victims of violent crimes.

And finally, the Council of Europe Convention on Preventing and Combating Violence against Women and Domestic Violence (the so-called Istanbul Convention) is also a very important document. It covers all forms of violence against women, including domestic violence, which disproportionately affects women. An overlay that promotes and protects life rights in an area of widespread and endemic violence. On June 1, 2023, the EU ratified the Istanbul Convention[21].

The Council of Europe's approach to violence against women, although based on the UN approach, expands the concept of preventive activities to include men and boys, assuming that they are most often the perpetrators of violence, but they can also oppose male perpetrators and stand on the side of women. – preventing or defending against violence. Moreover, attention is drawn to the need to conduct an anti-violence policy, including national action plans. Finally, multiple discrimination is considered, paying attention to particular risk groups such as Roma women, Sámi or lesbian, bisexual, transgender, and intersex (LBTI) people (Mergaert et.al. 2023, 3).

---

[21] The equivalent of the Istanbul Convention as a regional framework for combating and preventing gender-based violence is the Inter-American Convention on the Prevention, Punishment and Elimination of Violence against Women (Belém Convention, pará) and the Protocol to the African Charter on Human and Peoples' Rights on Women's Rights in Africa (Maputo Protocol).

DESCRIPTION OF TOPIC AREA

Universities are part of the society in which they operate. Therefore, it is reasonable to assume that:
  • Gender is a significant factor associated with harassment, sexual harassment, and sexual violence.
  • Power and authority within an organization also affect the occurrence of violence, including sexual violence.
  • People who have experienced harassment, sexual harassment or sexual violence at a university may endure long-term consequences of these incidents.
  • Universities play a prominent role in preventing and tackling harassment and sexual misconduct (Commissioner for Human Rights, 2019).

Thus, gender-based violence is a severe problem in higher education and affects staff and students. Unfortunately, the hierarchical nature of the academic structure, the patriarchal conception of learning, the instability of employment and the disregard for the adverse effects of violence inhibit the revision of anti-violence policies and the acquisition of data on the extent of violence. Meanwhile, it is estimated that 25% of female students have experienced gender-based violence during their studies, and staff are intimidated and harassed. UniSAFE (2021) research has shown that various forms of violence occur there: physical, psychological, economic, online, sexual, and sexual harassment. 62% of survey respondents experienced at least one form of gender-based violence while studying or working at their institution. This was even more common among people identifying as LGBQ+ (68%), people with a disability or chronic disease (72%), and people from an ethnic minority (69%). The most common is psychological violence (57%). One in three students and staff say they have experienced sexual harassment at their institution (31%), 6% of respondents have experienced physical violence, and 3% have experienced sexual harassment. One in ten respondents mentioned economic violence (https://unisafe-gbv.eu/project-news/results-from-the-largest-european-survey-on-gender-based-violence-in-academia/).

Justifications for violence are often based on gender norms – social examples of appropriate roles and responsibilities for men and women. These cultural and social norms socialise men to be aggressive, assertive, non-emotional and controlling, contributing to the social acceptance of men as dominant. Similarly, expectations of women as passive, caring, submissive and emotional

reinforce women's roles as weak, powerless, and dependent on men. The socialisation of both men and women has led to unequal power relations between men and women. In the university, this gender polarization and androcentric patterns of scientists and science are still present. The male role model of the profession of scientist and researcher is the norm and, as a result, women scientists constantly must prove that they are suited to scientific work and are competent workers and, in parallel, are expected to be 'feminine' in the sense of gender stereotypes. Similar difficulties are encountered by female students, who are, on the one hand, expected to be knowledgeable and competent in their scientific discipline and, on the other hand, judged by their attractive appearance and pleasant relationship. This phenomenon is called sexism. Researchers see sexism as a multidimensional construct involving stereotypical perceptions of people based on gender (Glick, Fiske 1996, 491-492). At its core is an attitude of either hostility or benevolence. Hostile sexism signifies negative prejudice against women (or men) based on stereotypical femininities and masculinities. Its consequence is denying access to socially valuable resources to women (or men) because of their gender category, excluding individual characteristics, potential, skills, needs, expectations, and rights. Examples of discrimination justified by this bias would be excluding girls and women from educational and scientific institutions, limiting the chances of female scientists pursuing careers in the sciences, or denying them authorship of research successes (the Matilda Effect). Benevolent sexism is also based on stereotypical attitudes towards women (some men) but is perceived subjectively as positive. This is because certain qualities or skills are vaporized, which may be pleasing, and which causes one to miss the fact that these qualities and skills are representations of a gender stereotype. A woman may be asked to take notes on the proceedings of a meeting because of her pretty, feminine handwriting or to make coffee for male co-workers (in the same positions) because of her particular – anticipated gendered – skills in doing so. Example item: "Women should be cherished and protected by men", "women, compared to men, have a superior moral sensibility", and "every man ought to have a woman who is adored" (Barreto & Doyle, 2023:100). Benevolent sexism is considered a negative phenomenon because its consequences are harmful: the perpetuation of gender stereotypes (Glick, Fiske 1996; 491-492).

The university has many forms of violence, its catalogue changes as society changes. Not only do we talk publicly about the incidence of violence, but

we also try to eliminate it as harmful and unlawful. For anti-violence policies and actions to be effective, it is essential to recognise the manifestations of violence, its sources and consequences and monitor our organisation systematically. Research to date indicates the occurrence of various forms of violence in the academic environment. The following are some examples (Council of Europe 2023):

• **Verbal violence** includes offensive remarks, humiliation, ridicule, or verbal intimidation. This can include situations in lectures and during interactions between students or staff.

• **Emotional abuse** involves actions designed to hurt another person emotionally. This can include ignoring, isolating, inducing guilt, threatening, exploiting, or manipulating another person's emotions.

• **Physical violence** refers to direct physical actions against another person, such as hitting, pushing, pulling, or any other form of physical aggression.

• **Psychological violence** includes actions to destroy someone's self-esteem, dignity, and sense of self-worth. This may include ridicule, humiliation, intimidation, ridicule, or creating feelings of fear.

• **Sexual violence** involves sexual assault, sexual harassment, rape, or other unwanted sexual behaviour. Sexual violence can occur between students or between students and university staff.

• **Economic violence** is "any act or behaviour which causes economic harm to an individual, e.g. harmed your work/studies through restricting access to financial resources" (UNISAFE 2022, 5).

• **Structural violence** refers to systemic and structural actions that may lead to discrimination, exclusion, or marginalization of certain groups at the university. This can include unequal treatment, prejudice, lack of access to resources, or equal opportunities (Bermúdez Figueroa et al. 2023).

• **Organisational violence** is a form of violence at the collective and organizational levels of universities and research organizations that may manifest itself in direct harassment of those studying gender or women's studies or indirectly through management's acceptance of GBV (https://unisafe-gbv.eu/the-project/gender-based-violence-unisafes-definition/).

The development of technology is a source of new forms of violence - **online violence** - such as:

• **upskirting**, which is the practice of taking photographs under the skirts or dresses of females without their consent (Lewis, Anitha 2023).

- **cyberviolence** is based on gender, includes cyberstalking, doxing, digital voyeurism, online harassment, non-consensual sharing of intimate or manipulated material, and cyber incitement to hatred or violence (2023 Gender equality in the EU, 7).

There is no single factor that explains gender-based violence in academia. However, it should be borne in mind that, in addition to EU policies, universities are also (and perhaps primarily) influenced by national institutions with their culture, law, economy, and politics. Thus, apart from the hierarchical, patriarchal structure of the academy itself, many of the causes of violence can be linked to cultural, legal, economic, and political factors.

- **Cultural factors**: Gender norms, values and symbols, and cultural representations of gender (present in religious traditions and historical records) justify dominance and power and normalise stereotypical expectations of femininities, masculinities and sexual, economic, domestic and war violence. They are rooted in myths, traditions, ideologies, and other socialisation messages, like the 'air we breathe' are invisible.

- **Legal factors**: For centuries, the law has served and protected upper-class men; women have had no rights. Nowadays, in EU countries, gender does not determine legal privileges, access to protection, or legal security. Legal norms are gender-neutral, at least de jure. However, there is still much to be done in applying the law and trust in the legal institutions of victims of violence. Being a victim of gender-based violence is sometimes perceived as shameful, deserved by the victim or frivolous. Many women victims of sexual violence, including rape, struggle with secondary victimisation and being blamed for provoking the violence. Therefore, the number of reports and investigations does not correspond to the scale of the violence.

- **Economic factors**: Women and various minorities are vulnerable to violence due to economic dependence and lack of access to resources for self-sufficiency and security. And poverty often goes hand in hand with violence due to the victim's helplessness and dependence and pathological masculinity based on violence directed at others (Acker 2006).

- **Political factors**: Gender-based violence is considered unimportant in some political environments and social groups. This can be changed by an increase in the presence of social actors in political institutions shaping discussions about the need to counter violence and mainstreaming the perspectives and experiences of victims. Addressing the issue of gender-based

violence in the public sphere can contribute to changing awareness and attitudes towards violence, victims, and perpetrators.

Victims of violence become mentally and physically ill, lose motivation to work and study, and give up their education and professional development. Their work or research group suffers losses: sometimes, the research team or dean's group ceases to function well. For the research and higher education sector, gender violence means the loss of valuable students and staff and the loss of intellectual capital. At the societal level, violence perpetuates social inequalities, including vertical and horizontal segregation in the labour market. The cost of ignoring violence in universities and the devastation that violence causes at the micro, mezzo and macro levels make this issue one that requires the intervention of international organisations and political commitment.

The Ljubljana Declaration emphasized that gender-based violence "in higher education and research, including sexual harassment, is a serious and under-recognised issue with severe negative impacts on study and career outcomes in research and higher education. A cohesive infrastructure and procedures for preventing and tackling gender-based violence and harassment in academia in the Member States and other countries are missing". (https://www.gov.si/assets/ministrstva/MIZS/Dokumenti/PSEU/Ljubljana-Declaration-on-Gender-Equality-in-Research-and-Innovation-_endorsed_fin al.pdf). This document confirms the need to include the area of GBV in Gender Equality Plans.

Why is gender-based violence an essential issue in Gender Equality Plan?

• Firstly, it violates human rights, is an attack on dignity and self-esteem. It can lead to loss of health (depression, self-mutilation) and life (suicide attempts).

• Secondly, gender-based violence threatens people's sense of security and psychophysical integrity. Thus, it may limit or prevent the self-realization and development of the individual and the entire academic community.

• Thirdly, gender-based violence is discrimination based on stereotypes and social prejudices, i.e., overly generalizing and emotionally charged images of women, men, and non-binary people (different psychosexual orientation, age, ethnic origin, social class, etc.). Discrimination causes the marginalization or exclusion of individuals from access to valuable economic, social, and symbolic resources.

• Fourthly, gender-based violence is an obstacle to gender equality, i.e., it

hinders the development of democracy and an inclusive society. It perpetuates the patriarchal social system with the heteronormative man as the "universal" norm. And, as we know from the gender policy, mainstreaming is a crucial problem for the academy and requires both axiological, normative, and structural changes.

• Fifthly, gender-based violence affects everyone at the academy, not just the immediate victims. Witnesses of violence may become convinced that violent behaviour is justified or 'normal' and begin to assimilate and recreate brutal norms. Eventually, the entire organizational culture can become violent.

• Sixthly, gender-based violence has a very high economic cost. Therefore, it is in the academy's interest to guarantee a sense of security to employees and students. Victims of violence bring worse results at work and in school, get sick more often and are often absent due to hospitalization; they can also claim compensation from the academy employer for the lack of adequate protection against violence in the workplace (Pandea et al. 2020, 18-20).

In the European Union, no specific provision directly justifies investigating university violence at the EU level. However, several directives and documents can provide a basis for action to prevent and combat university violence in the Member States. The following are some of them:

• Council Directive 2000/43/EC

on applying the principle of equal treatment between persons irrespective of racial or ethnic origin: This directive prohibits discrimination based on race or ethnic origin. It can provide a basis for combating violence based on these grounds in universities.

• Council Directive 2006/54/EC

on applying the principle of equal treatment in employment and occupation: This directive prohibits discrimination based on sex in the workplace. It can be used for gender-based violence in universities.

• Council Directive 2012/29/EU

of the European Parliament and the Council on the Rights of Victims: This directive sets out minimum standards for protecting and supporting victims of crime, including violence. It may apply to university violence if the victim is a student, employee, or connected to the university. In addition, many Member States of the European Union have national legislation on violence at universities. These laws may be based on EU directives or independent regulations protecting students and university staff.

It is important to remember that the specific legal provisions on violence at university may vary, depending on the Member State and the legal and institutional system (criminal law, equality and non-discrimination legislation, employment law).

Many universities have policies, guidelines, and rules to address violence at the university. These may set out definitions of violence, procedures for reporting, handling, and sanctions, as well as preventive measures taken. These internal regulations can form the basis of an investigation into violence at the university.

The lack of international legal regulations focused on counteracting GBV in universities and science is compensated by the existing legal framework of the UN, EU, and the Council of Europe, described in the "introduction". However, it is recommended to expand the model to include further areas of activity to include ultimately:

1. Policy, expressing the vision, strategy, policy documents, and measures and providing the basis for all actions.

2. Estimates, based on social research (surveys) and administrative data, regarding the incidence and causality of GBV.

3. Prevention, meaning promoting socio-cultural change among all groups that make up the university.

4. Protection, i.e., clear procedures and available infrastructure for survivors.

5. Prosecution and disciplinary measures, i.e., proceedings against perpetrators of violence.

6. Provision of service, i.e., specialized support for survivors (and their families) and a network of available services.

7. Partnerships, i.e., the involvement of various entities in the implementation of the model, together with trade unions, social organizations, and government agencies (Mergaert, 2023, 4).

SUGGESTED METHODS OF INVESTIGATION WITH EXAMPLES

The researchers assumed that thanks to the multitude of methods, it is possible to delve deeper and broader into such a complex problem as gender-based violence. The study of university violence requires a multifaceted and multilevel approach. Different research methods and techniques, whether quantitative, qualitative, or mixed methods, serve this purpose, and the final decision on the choice of method depends on the research questions.

Methods used in GBV studies:
  Recommended methods:
  1. Survey
  2. Focus group interview
  3. Semi-structured individual interview
  4. Individual Interview
  5. Participatory action research included research walk
  6. Media content analysis

Study 1: Gender-based violence, stalking and fear of crime - part of a European Commission program "Prevention of and Fight against Crime"

One of the most common ways of examining the phenomenon of violence at universities is the diagnostic **survey** method. An example of a successful application of this approach is a study "Gender-based violence, stalking and fear of crime" – part of a European Commission program "Prevention of and Fight against Crime". For research purposes, the following hypothesis was formulated: female students are affected by incidents of sexual violence to a greater than average extent – due to their age and life situation – compared to other national studies on gender-based sexual violence. When selecting the sample, care was taken to ensure that it reflected the specificity of higher education in each country, considering geographical distribution and coverage area (urban or rural), size and prestige, and the type of institution. Students from five countries and 34 universities participated in the study reaching a total of 21,516 people. The survey questionnaire consisted of several parts: an introduction explaining the researchers' intentions and the formulated research goals that the survey serves; questions about socio-demographic characteristics and structural location at the university (demographics); questions about the sense of security at the university; and finally, questions directly related to experiences of violence in the form of sexual harassment, stalking and sexual violence (forms of violence, frequency, perpetrator, place and time of the attack, consequences, subjective feeling of fear); and selected practices of resistance and support. The questions were designed as completely closed-ended, with single and multiple answers. Due to the topic's sensitivity, instead of mandatory questions that could be perceived as putting pressure and causing discomfort, the answer options "I don't know" and "I don't want to answer" were used. This was intended to signal to

the respondent that it was up to her to decide whether and how to respond. And the right to refuse to answer a question that is too sensitive is respected. Harassment was operationalized as situations in which someone shows someone else, against their will, pornographic images; someone gropes or tries to kiss the other person against their will; someone tells dirty jokes without the other person's approval; someone makes another person feel uncomfortable through heard comments; torments another person with whistling and offensive comments; harasses another person by phone, SMS, e-mail or letter; someone threatens another person, and other. Stalking has been conceptualized as the occurrence of such behaviours as attacking or exposing another person to risk; making threats against another person's relatives; physical attack; making a threat of death or physical attack against another person; intentional destruction of another person's property; threatening self-harm and suicide; threatening to break another person's mental health; harassing family, friends, fellow students, neighbours; breaking into or attempting to break into another person's home or e-mail account; spying; intrusion at home, workplace, university; unsolicited phone calls/letters/e-mails/texts/messages. Sexual violence was operationalized in the study as the following behaviours: being forced to engage in other sexual activities or practices against the will of another person; forcing someone to view pornographic photos or videos and acting them out against the will of another person; being forced to engage in intimate touching, caressing and similar activities; an unsuccessful attempt at penetration with a penis against the will of the other person; forcing sexual intercourse and using a penis or other object to penetrate the body of a person who has not consented. The list of answers to the question about the place of harassment included: "outside the university," and "in the university": inside student residence halls, on the university campus, in the parking lot, in the elevator/stairs/hallway, in the toilet, in the sports hall/locker rooms, in the canteen/cafe, in student union rooms, in staff offices, in Library, in Lecture hall/seminar hall. The choice list of answers regarding the identity of the perpetrator included, among others: someone from outside the university, a friend from the university, university employees, lecturers, a group of friends, someone from the family, or former partners. The choice list of known places supporting victims of violence included the dean of Students, Student Government, University Counselling Center/Therapist, Self-Help Group/Center, Women's Counselling Center/Women's Emergency Service, Other Counselling, Doctor, Therapeutic Support, Minister, and Pastor, other help.

Using the data collected in a survey, it was possible to analyse the incidence of violence at the university, identify risk factors, assess the effectiveness of preventive measures, and understand the experiences and needs of students. Analysing the survey results made it possible to determine the prevalence of several types of violence, identify at-risk groups, identify risk places, understand the scale of the problem, and compare results with students from different countries.

Question list of this study can inspire you when creating new questionnaires. The multi-aspect nature of the issues discussed may constitute a starting point for research focused on one of the examined threads.

Recommendation: This study provides an example of diagnosis and evaluation.

- **Source**: *Gender-based violence, stalking and fear of crime*" - part of a European Commission program "*Prevention of and Fight against Crime*" (2012) http://www.gendercrime.eu/pdf/gendercrime_final_report_smaller_version.pdf

Study 2: Gender-based violence, stalking and fear of crime - part of a European Commission program "Prevention of and Fight against Crime"

The project "Prevention of and Fight against Crime" used focus group interviews, too. FGI is one of the most popular qualitative methods: it allows us to reach places where quantitative tools fail and where the problem is only recognised, and its research does not have a long, well-established research tradition. The study involved 167 female students who experienced sexual harassment in the survey. The focus groups consisted of approximately ten people, the interview duration ranged from one to two hours, and one or two moderators conducted it.
Moderators introduced general topics for discussion and asked questions organised around several key issues: gender-based sexual violence (definitions and different forms, risk factors), image of victims of violence; perceptions of safety at the university and in the city; perpetrators; the consequences of gender-based sexual violence; reporting incidents of violence; proposals for future reforms and improvements.

Research results: according to the participants of group interviews, the perpetrators of sexual violence are often not strangers, as is commonly believed, but acquaintances. They drew attention to the fact that at the university, which is a hierarchical institution, sexual violence based on gender occurs between

academic staff and female students. The students failed to reconstruct a common understanding of the concept of a victim of gender-based sexual violence, and it was even rejected at some universities. When discussing risk factors, stereotypical concepts of femininity were recreated and pointed to lifestyle, clothing, going out alone at night, sexual history, and economic position. There was a shared belief that gender-based sexual violence causes psychological and physical consequences in the lives of victims and that it can be one of the most distressing episodes in a woman's life. Many of the students interviewed also highlighted the social isolation a victim faces if they go public with their experiences and that many victims feel they are partly responsible for what happened, either by not doing enough to prevent the incident or by believing that they had somehow provoked the attack.

Recommendation: This study provides an example of diagnosis and evaluation.

- **Source**: "*Gender-based violence, stalking and fear of crime*" - part of a European Commission program "*Prevention of and Fight against Crime* (2012) http://www.gendercrime.eu/pdf/gendercrime_final_report_smaller_version.pdf

Study 3: A Project for Advocates for Youth. The Cost of Reporting: Perpetrator Retaliation, Institutional Betrayal, and Student Survivor Pushout

The research was conducted as part of the Know Your IX, a survivor- and youth-led project of Advocates for Youth. The study was conducted as part of Know Your IX, a survivor- and youth-led project of Advocates for Youth. Its goal was to show the consequences of failing to comply with Title IX, which obliges schools to protect students against sexual violence and its consequences. Research participants were students who experienced sexual violence, and who formally reported this fact to the school, and the school did not fulfil its obligations arising from its legal obligations.

The **survey** was distributed by the Know Your IX organization on Instagram and Twitter and via e-mail lists of victim/survivor advocates and Title IX lawyers. Research was carried out from September 1, 2020, to January 9, 2021. A total of 107 people completed the survey. The questionnaire contained 13 summaries, and respondents were to choose those that best described their experience. Then, open questions were asked about whether the experiences marked on the list influenced further education, career, finance, health, privacy, and security. If the answers were affirmative, they were asked to share the participants' own experiences.

The next stage of the research included a **telephone interview** with 12 people and one **online interview**.

The study's results showed that out of those who survived, 62.5% either took a leave of absence, changed schools, or dropped out. However, 39% of respondents were forced by their school to take a leave of absence, transfer to a new school, or leave the school altogether. 35% of survivors surveyed said their schools explicitly encouraged them to take time off. 15% of survivors were threatened with punishment for coming forward. 10% of survivors experienced retaliatory testimony, and one in five survivors was threatened with defamation lawsuits. More than 40% of survivors revealed that they suffered from post-traumatic stress disorder (PTSD). More than a third of survivors reported feeling anxious and more than a quarter became depressed. Nearly 15% of survivors reported panic attacks and about the same percentage talked about attempting suicide or having suicidal thoughts.

Researchers drew attention to the tragic consequences of the lack of support for survivors, both educational, professional, financial and health-related.

Recommendation: This study provides an example of diagnosis.

- **Source**: Nesbit, S., Carson, S., Ghura, S.,O'Brien, J., (2021) *A Project for Advocates for Youth. The Cost of Reporting: Perpetrator Retaliation, Institutional Betrayal, and Student Survivor Pushout.* https://www.knowyourix.org/wp-content/uploads/2021/03/Know-Your-IX-2021-Report-Final-Copy.pdf

Study 4: **Sexual Harassment of Women: Climate, Culture, and Consequences in Academic Sciences, Engineering, and Medicine**

Much attention is devoted to this issue in the report entitled *Sexual Harassment of Women: Climate, Culture, and Consequences in Academic Sciences, Engineering, and Medicine* (2018).
The research described in it assumed that the strongest predictor of sexual harassment is the organizational climate, understood as the degree to which people perceive that sexual harassment is or is not tolerated. Attention was drawn to the fact that science, engineering, and medicine are fields with standard features that create conditions that increase the likelihood of harassment in research institutions.

They assumed that there are three categories of behaviour related to sexual harassment: (1) gender-based harassment (verbal and non-verbal behaviour that expresses hostility, objectification, and exclusion due to second-class status about people of a specific gender), (2) unwanted sexual attention (unwelcome verbal or physical sexual advances that may include assault), and (3) sexual coercion (when favourable employment or educational treatment is contingent on sexual activity). Harassment may be direct (directed at a specific person) or environmental (general level of sexual harassment in the environment).

Research questions were formulated:

1. How do women who are targeted for sexual harassment in sciences, engineering, and medicine characterize and understand those experiences?

2. How do women who are targeted for sexual harassment respond to their experiences in the short term?

3. How do women who are targeted for sexual harassment understand their experiences to have shaped their career trajectories?

4. What barriers or challenges do respondents believe prevent sexual harassment in sciences, engineering, and medicine from being addressed?

Researching experiences of violence, including sexual harassment, requires the selection of appropriate research methods and sample selection methods. In this case, a qualitative study was conducted in the form of a **semi-structured individual interview**, the scenario of which included the topic: understanding sexual harassment (e.g. experiences that are considered harassment); history of experiences of sexual harassment in the workplace within the last five years; reactions to these experiences; perceived impacts of sexual harassment on work and career path; ideas on how to prevent or better respond to sexual harassment.

The research sample was purposefully selected: 40 women working as lecturers in SEM disciplines in research institutions who had experienced sexual harassment in the last five years were selected for the study. The decision on the final composition of the 40-person research sample was preceded by a two-stage procedure: first, online surveys were sent, to which 340 women responded; 65 candidates were shortlisted for job interviews using the screening tool; and, 40 candidates were invited to participate. The interviews were conducted by telephone, recorded, and lasted approximately one hour. The interview began with a series of closed questions (with the option of answering Yes or No) followed by open questions. The recordings

of all interviews were professionally transcribed, and all data that would threaten the anonymity of the participants was removed. The de-identified transcripts were then uploaded to ATLAS, a qualitative data analysis software package, and the analysis team processed the study results. The research sample was not representative; therefore, the results cannot be generalized. Thanks to the interview method, it was possible to collect high-quality data and deepen knowledge about the individual and institutional experiences of sexual harassment of women working as lecturers in institutes of science, engineering, and medicine.

The most common sexist experiences include comments and jokes about women and transgender people, followed by comments about someone else's body, appearance, attractiveness, and unwanted, offensive jokes and photos and stories of a sexual nature. Half of the respondents experienced unwanted touching; one quarter experienced unwanted sexual advances and pressure to consent to sex or romantic relationships. 30% filed an official complaint. Over 60% no longer work in a place where they experienced sexual harassment.

Women who chose to formally report their concerns or otherwise speak out about the experience often mentioned the negative, long-term impact on their careers, such as resigning from their position as associate dean, taking up a position at a less prestigious university, dismissal as part of a retaliatory action, resignation from a large research project. Others remained in their positions but suffered from lack of promotion, for example, not receiving tenure or not becoming a full professor. Several gave up employment opportunities to avoid their perpetrators and avoid situations that they believed could expose them to future sexual harassment.

Respondents presented many ideas and strategies to improve the situation regarding sexual harassment prevention and response. They called for greater attention to how the management of faculties and institutes shapes the university climate regarding sexual harassment and called for work to change department and university norms. The proposal was to improve the university climate through training at the various stages of a career that reflects the entire continuum of behaviour related to sexual harassment, including gender-based harassment; implementing sexual harassment policies and better enforcing existing policies; thoroughly screening job applicants for prior sexual harassment; security and confidentiality when submitting complaints and taking actions to protect reporting persons; and finally the need for coordinated action

to change cultural norms regarding sexual harassment and full support for women in science, engineering and medicine.

Recommendation: This study provides an example of diagnosis and evaluation.

- **Source**: *Sexual Harassment of Women: Climate, Culture, and Consequences in Academic Sciences, Engineering, and Medicine*, (2018). https://pubmed.ncbi.nlm.nih.gov/29894119/

Study 5: The Violence of Impact: unpacking relations between gender, media, and politics.

Heather Savigny drew attention to the violence experienced by women scientists in the mass media, including the Internet, in connection with their activities in disseminating and popularizing scientific knowledge and the results of their own research or expert commentary on social reality. The researcher uses the concept of "cultural sexism", perceived by women as an everyday and common cultural practice in their ordinary lives, as a predictor of the weakening or marginalization of women's scientific experience and contribution, and ultimately, structural silencing. The research question she wanted to answer with her research was: how do women experience cultural sexism in disseminating their knowledge on social media? The study used an online survey tool to recruit interlocutors for individual in-depth interviews. The selection of the sample was purposeful and non-probability. The survey was sent to scientists from various disciplines: science, social sciences, humanities, and arts. Different mailing lists in political science, feminist studies, the Black British Academics Network, and university women's networks across the country were used. 76 respondents took part in the survey. After the interview, 18 people were selected for in-depth interviews. The interviews were not time-limited, and great care was taken to ensure the interviewees' comfort and well-being. This built in-depth reflection on one's own experience and released previously unverbalized experiences. As the researcher writes, it had a cleansing effect on the interlocutor and opened her up for further meetings. The interviews were anonymized, and the text was consulted with the interviewees before publishing the article. The topics of the interviews included the issue of experienced violence: actual, anticipated, symbolic and epistemic; gender norms and stereotypes; and the cumulative effect of silencing.

Research conclusions: Women spoke of a sense of personal threat, loss of their own and family's safety, deterioration of health and the quality of academic work. Some of them decided to withdraw from media activity due to trolling with sexist and racist content, despite the academia's expectations that they would participate in disseminating and popularising their research achievements.

Violence on the Internet, mainly on Twitter, undermined research competencies and depreciated women's scientific position, questioning women's contribution, and influence in science. A lack of support for the attacked female scientists from the academic community accompanies this.

A good practice is women's Internet groups and networks of researchers, which are increasingly involved in exposing sexism in attacks on women scientists, or the involvement of scientific authorities in expressing their support for this or that researcher on social media. However, what needs to be considered by the author, is the issue of universities' support for their employees activities on social media for scientific reasons and a policy of influence based on media visibility, which turns out to not consider the different conditions of the public functioning of women and men in science.

Individual interviews: Conducting individual interviews with people experiencing violence at the university can provide insights into their experiences, feelings, and perspectives. Interviews can be structured, semi-structured, and free form. The more structured the interview questions, the easier it is to summarise the results. But on the other hand, the more open-ended the questions, the more freedom the interviewees have to express their experiences. Interviews are one important research method that can effectively study violence in the university context. Conducting interviews provides an in-depth understanding of the experiences, perspectives, and social contexts associated with violence. The advantage of interviews is that they elicit detailed, individual narratives from those directly involved in violent situations. Interviews allow researchers to ask open-ended questions and flexibly adapt questions during the interview, allowing for deeper understanding and more detailed responses. Investigating violence through interviews can help uncover the hidden patterns, contexts, and motivations that underlie these behaviours. In addition, interviews can capture nuances and subtle aspects of violence that may be more difficult to capture through other research methods. The researcher can better understand the emotions, reactions, and effects of violence for those who have experienced violence

at the university. When researching sensitive topics such as violence, there is also a risk of trauma for those who share their experiences. It is, therefore, essential to be appropriately empathetic, sensitive, and ethical when conducting interviews.

Recommendation: This study provides an example of diagnosis, evaluation.

• **Source**: Savigny H., (2020). *The Violence of Impact: unpacking relations between gender, media, and politics*. *Political Studies Review*, 18(2), 277-293. https://doi.org/10.1177/1478929918819212

Study 6: Lucy Edwards-Jauch Action research on gender-based violence at the University of Namibia: Results and methodological reflections

University violence was researched using the action method aimed to involve research participants as partners in the research process. The technique involves the active involvement of people experiencing violence, witnesses, and other stakeholders in identifying problems, analysing causes, and seeking solutions. The study of The Department of Sociology at the University of Namibia (UNAM), in collaboration with the University of Cape Town-based African Gender Institute (AGI), exemplifies the successful use of this research approach.

The following are some steps that were taken when conducting that method of research on violence at the university:

• Create a participatory group: Create a group that includes people experiencing violence, witnesses, representatives of the university community, university staff and other stakeholders. It is crucial to ensure a diversity of perspectives and voices from all participants.

Two Department of Sociology lecturers and a group of ten student co-researchers built a research group at the University of Namibia.

• Jointly establish the study's objectives: Discuss with the participant group to identify the study's objectives, research questions and areas to be explored. Ensure that the study's goals are consistent with the needs and priorities of the participants:

The research topic proposed by the lecturers concerned the phenomenon of *kamborotos*, i.e., sexual transactions between young women (students) and older men. The students rejected this topic and decided to look for a topic

that was important to other students, especially those living on campus in dormitories. And already at this stage, the process of participation of the academic community in the research process began. After consultation and preliminary research, it was determined that the main concerns regarding sexual and reproductive rights on campus should be investigated.

• Selecting research methods: Choose appropriate research methods with the participatory group, such as workshops, focus groups, social mapping, photo documentation, diaries, or other participatory tools. The task is to find ways to express different perspectives and experiences:

In the described case, workshops were first organized for research group members. They aimed to identify gaps in knowledge about the activities of institutions (universities) in counteracting gender-based violence. The research tasks included collecting and reviewing, among others: documents on gender policy, reproductive rights, and health and GBV. Research **grey literature**, and **legal research** identified that written policies did not exist in some areas: gaps in access to documents included sexual harassment and HIV/AIDS. To obtain the missing information, **interviews** were conducted with key informants: a nurse from the university clinic, the vice dean for students and the head of the hospital. Then, ART members conducted information and educational workshops with other students. Ten core group members were divided into five two-person teams, and each team conducted workshops for 14-18 students. The workshops were held in parallel, with the possibility of interaction.

Each group walked through a university campus (**research walk**) to identify dangerous places where women feel unsafe and are most likely violently attacked. They were documented photographically.

• Data analysis and interpretation: Analyse the collected data with the participatory group, including their perspectives and interpretations. Together, try to identify patterns, risk factors and potential solutions in the context of violence at the university.

In the described case, it was established that places particularly dangerous for women are taxi ranks in front of the university gate, public part of dormitory rooms, and some lecture halls. Participants reported that some lecturers exchange grades for sexual favours, security guards inappropriately touch female students, and some male students whistle, grope, touch, and comment on women's appearance. Female students are also victims of date rape,

publishing intimate videos and photos of women without consent, and ignoring reports of harassment by the police and university authorities.

• Actions and recommendations: Develop concrete steps and recommendations together with the participatory group, to address violence at the university. Try to ensure that these recommendations are based on the knowledge and experiences of the study participants. And finally, implement the changes and monitor progress.

To disseminate research results, the University organized events to raise awareness of GBV and encourage counteracting violence. A signature collection campaign was carried out; an information brochure on the procedure for reporting sexual harassment was distributed; on International Women's Day (March 8), a demonstration was organized, and a petition was handed over to the university authorities; a panel discussion was held; and a theatre afternoon was held, where members prepared the participatory drama "Malaika".

This P(A)R combines research exploration with education and social involvement. They give a sense of agency to those who feel helpless in the face of various irregularities. In this case, it concerns women students, but it may also apply to other groups that are marginalized or deprived of their "voice" in each organization. This method is not limited to establishing facts but implies value judgments. It is used to build knowledge, education, reflective actions, and social transformation.

Recommendation: This study provides an example of diagnosis, evaluation, and monitoring.

• **Source**: Edwards-Jauch, L., (2012). *Action research on gender-based violence at the University of Namibia: Results and methodological reflections*, Feminist Africa Issue 17, 107-111.
https://feministafrica.net/wp-content/uploads/2019/10/8_profile_-_action_research_on_gender-based_violence_at_the_university_of_namibia.pdf

Study 7: Piñeiro-Otero, T., Martínez-Rolán, X. (2021). "Say it to my face: Analysing hate speech against women on Twitter"

New media are an essential tool used by scientists to popularize the results of their research or provide expert commentary on issues important to society. Unfortunately, they experience violence and fall victim to attacks from users. This problem was investigated in this recommended project.

To investigate the manifestations of sexist hate speech and misogyny on Twitter, an analysis of the most frequently used negative expressions in conversation – both with and about women – was conducted. 50 female Twitter users who play a significant role in public life were selected, including female scientists. Posts from October 1, 2019 to October 1, 2020 were analysed. Graphext software was used to collect the data. This made it possible to create a research sample consisting of:

– Content representing direct interactions, i.e., interactions in which users directly referred to one of the women's tweets or mentioned them (by quoting the woman's Twitter profile name) in another conversation;

– Indirect mentions, i.e., mentions in which the names of users were used without specific reference to their Twitter account.

These search parameters yielded a total of 511,587 tweets, 302,790 direct interactions and 200,797 indirect mentions of women on Twitter. Once the sample was selected and the data collected, a list of slurs and other negative expressions was prepared. Terms suggested by Torres-Ugarte, creator of the website https://www.odiometro.es, and by the lexicon developed by Bean, Carnaghi, and Paladino (2015) were used.

A preliminary list of 204 expressions, including swear words and insults, was created on this basis. A total of 62,560 slurs and other offensive terms were identified. 12.8% of tweets directed at women contained an offensive term. Of the 290,603 tweets, 42,384 contained slurs or other unpleasant expressions. Far more Tweeters insulted women directly (15% of offensive terms) than indirectly (10%). The most recurring term in a sample of posts was 'mierda' (shit) and related expressions. Another frequent insult was the term 'fascist' (fascist). The most used sexist slur in the sample was 'feminazi'. There were also insults with overt or covert sexual overtones: cerda/puerca (literally 'sow', dirty, also sexual), the expression 'hija de puta' (literally 'daughter of a bitch').

Twitter turns out to be a hostile place for women. Offensive language directed against professionals can be understood as a manifestation of gendertrolling, sexism and androcentrism. Media content research can help analyse the scale and type of cyberbullying and gather evidence of the occurrence of this phenomenon, which is subject to criminal sanctions.

Recommendation: This study provides an example of diagnosis, evaluation, and monitoring.

• **Source**: Piñeiro-Otero, Teresa; Martínez-Rolán, Xabier (2021). *Say it to my face: Analysing hate speech against women on Twitter*. Profesional de la información, 30(5), e300502. https://doi.org/10.3145/epi.2021.sep.02

Study 8: The Intersection of Gender Identity and Violence: Victimization Experienced by Transgender College Students

The study used the nationwide National College Health Assessment – II dataset. The study covered seven health content areas: safety, alcohol and other drugs and sexuality, behaviour, nutrition and physical activity, mental health, the impact of scientists on health and demography.

Participation in the research was voluntary. They were conducted in the fall of 2011, 2012, and 2013. In total, 44 institutions in 2011, 51 institutions in 2012 and 57 schools in 2013 participated in the survey.

This study included five demographic items and nine types of violence or victimization. The primary comparison variable in this study, gender identity, was determined by a single item: "What is your gender?" Response options included women, men, and transgender. Participants could not select multiple options for this item, which limited more specific descriptions of their gender identity, such as male-to-female transgender or gender fluidity. Other demographic information included sexual orientation, education level, relationship status, and race and ethnicity. The following types of violence or victimization were distinguished: four forms of violence from an intimate partner (physical violence, psychological abuse, sexual abuse, stalking), three forms of sexual violence (touching without consent, attempted sexual penetration, sexual penetration) and two other forms of violence (physical assault, verbal threat).

This study used men as the reference group because previous data has shown that they experience lower rates of sexual victimization than women and transgender students.

Most of this sample was female (67%), heterosexual (91%), Caucasian (66%), and single (51%), and the mean age of the sample was 22.22 years. Overall, in the last 12 months, 4% of students admitted that they had experienced physical violence, 18% had received verbal threats, 6% had sexual contact without consent, 3% had experienced attempted sexual penetration without permission, 1.5% had experienced sexual violence and penetration without support, and 6% experienced harassment. In terms of relationship violence

in the last 12 months, 9% had experienced violence in an emotionally abusive relationship, 2% had experienced physical violence, and 2% had been in a sexually abusive relationship.

Research has shown that victimization rates vary by gender identity and that there are significant differences in experiences of violence and the likelihood of it occurring. Transgender students had higher overall rates and odds of all nine victimization variables than males. Most cases involve sexual victimization. Additionally, transgender students were significantly more likely than girls to have experienced all forms of victimization except being in an emotionally abusive relationship. Research suggests transgender victimization occurs due to systemic, familial, and social discrimination and microaggressions.

The author concludes that by recognizing the impact of victimization on individuals across universities and identifying subpopulations of students who are most at risk for victimization, higher education programs and interventions can improve health and safety and reduce adverse outcomes for these students.

Recommendation: This study provides an example of diagnosis.

• **Source**: Griner, S.B., Vamos, C.A., Thompson, E.L., Logan, R., Vàzquez-Otero, C., & Delay, E. M. (2020). *The Intersection of Gender Identity and Violence: Victimization Experienced by Transgender College Students*. Journal of Interpersonal Violence, 35(23-24), 5704-5725. https://doi.org/10.1177/0886260517723743

Study 9: **Gender Identity and Diversity in Oklahoma Sex Health Curriculum: Non-Binary Student Voices**

For this study, interviews were conducted with University of Oklahoma students who are nonbinary and received sex and health education at a public high school. Each interview was recorded, transcribed, and analysed using 12 NVivo. As a result of the analysis of the interviews, 15 topics emerged, of which six were selected, present in each interview and with the highest frequency of appearance in each one. Based on the research conducted, it was established that:

Firstly, the "hidden curriculum" in gender lessons was based on a heterosexual norm.

Secondly, the lack of a sense of security resulted in the inability to reveal oneself.

Thirdly, mental health problems were related to the conflict between one's gender identity and the expectations of the social environment, especially peers.

Fourthly, the so-called school climate and inclusiveness would increase the chance of coming out.

Fifthly, the postulate of freedom in self-defining gender identity, meaning the need for autonomy and self-reliance in defining gender without the need to fit into the binary order. Sixthly, gender-based violence, resulting from an incorrect assessment of one's own gender and the gender of the perpetrator.

Recommendation: This study provides an example of diagnosis.

• **Source**: Scout, H., Anvar, H., (2022). *Gender Identity and Diversity in Oklahoma Sex Health Curriculum: Non-Binary Student Voices.* University of Oklahoma. https://shareok.org/handle/11244/335540

CONCLUSION

Anyone can experience gender-based violence. However, it disproportionately affects women and girls. Groups at increased risk include women with disabilities, young and adolescent girls, older women, women identifying as a sexual minority, women from ethnic minorities, refugees, and migrants (Library of Congress 2023). GVB is also more likely to affect people who identify as women (MtF) than men (FtM) (Gallardo-Nieto 2021) and members of gender minorities (Goldbach 2022).

Ignoring or concealing the phenomenon of violence in any organization, including universities, results in negative consequences in the lives of individuals, institutions, science, and society. Therefore, the key goals of the Gender Equality Strategy 2020-2025 include ending gender-based violence and challenging and eliminating gender stereotypes. These activities include:

– preventing and combating gender-based violence;
– supporting and protecting victims;
– holding perpetrators accountable.

To effectively counteract violence, it is necessary to systematically diagnose the scale and forms of violence in the academic environment and assess the effects of the actions taken.

In practice, testing for GBV at universities is a complex and long-term process, which is additionally influenced by many factors. In North America, for years now, campus studies have been conducted on students' perceptions of safety, including concerns and experiences related to sexual assault and violence, and these activities were officially supported in 2022 by the United States Congress with regulations enabling the survey to be conducted every two years in all schools, colleges and universities using federal funds. It is different in Europe. GBV research encounters mental and institutional barriers, and its results are rarely disseminated. GBV researchers at universities point to the concealment of research results out of concern for the university's reputation, lack of institutional support for researchers (lack of a sufficient number of researchers, short implementation time, lack of adequate remuneration for work performed in free time), lack of recognition for the job done, management on treating research on GBV as one of the priorities, lack of a long-term research policy enabling systematic diagnosis, monitoring and evaluation of anti-violence policy (Bull, A., Livesey, L., Duggan, M. 2023).

Research on GBV and anti-discrimination actions in the university environment should consider all shareholders: management staff, administrative staff, scientists, researchers, lecturers, PhD students and students. All of them should participate in the reconstruction of organizational culture, and all groups should be included and heard.

The Gender Equality Strategy 2020-2025, therefore, adopts a gender mainstreaming approach combined with targeted action and intersectionality. This means conducting a diagnosis and evaluation that examines the phenomenon of violence much more broadly and thoroughly and considers other socio-demographic characteristics, not only gender, such as age, psychosexual orientation, race, ethnicity, and class.

RECOMMENDED SOURCE

• EIGE (2022) Gender Based Violence.
https://eige.europa.eu/gender-based-violence

• European Commission (2023) Gender equality in the EU,
https://commission.europa.eu/system/files/2023-04/annual_report_GE_2023_web_EN.pdf

• UniSAFE-Security and safety of HEIs students and staff moving abroad.
https://unisafe-gbv.eu/

REFERENCES

• Acker, J. (2006). *Inequality Regimes: Gender, Class, and Race in Organizations*. Gender & Society, 20(4), 441-464
https://doi.org/10.1177/0891243206289499

• Barreto, B., & Doyle, D.M. (2023) *Benevolent and hostile sexism in a shifting global context*. Nature Reviews Psychology | Volume 2 | February | 98–111.

• Bermúdez Figueroa, E., Dabetić, V., Yuste, R.P., Saeidzadeh, Z. (2023). *Gender and Structural Inequalities from a Socio-Legal Perspective.* In: Vujadinović, D., Fröhlich, M., Giegerich, T. (eds) *Gender-Competent Legal Education. Springer Textbooks in Law*. Springer, Cham. https://doi.org/10.1007/978-3-031-14360-1_4

• Bull, A., Livesey, L., Duggan, M. (2023). *There are too many barriers to publishing data on gender based violence in higher education*. Wonkhe, 4.09
https://wonkhe.com/blogs/there-are-too-many-barriers-to-publishing-data-on-gender-based-violence-in-higher-education

• Council of Europe (2023) Type of Gender-Base-Violence.
https://www.coe.int/en/web/gender-matters/types-of-gender-based-violence

• Council of Europe (2023) Harassment and sexual harassment.
https://www.coe.int/en/web/gender-matters/harassment-and-sexual-harassment

• Declaration on the Elimination of Violence against Women: resolution/ adopted by the General Assembly (1993).
https://digitallibrary.un.org/record/179739

• EIGE (2021) Gender-based violence costs the EU €366 billion a year.
https://eige.europa.eu/newsroom/news/gender-based-violence-costs-eu-eu366-billion-year

• Edwards-Jauch, L., (2012) *Action research on gender-based violence at the University of Namibia: Results and methodological reflections*. Feminist Africa Issue 17,2. Researching Sexuality with Young Women: Southern Africa.

• EIGE (2020) "Sexual Harassment in the Research and Higher Education Sector: National Policies and Measures in EU Member States and Associated Countries" approved by the Standing Working Group on Gender in Research and Innovation on 22 May.
https://data.consilium.europa.eu/doc/document/ST-1205-2020-REV-1/en/pdf

• EIGE (2022) Gender Based Violence.
https://eige.europa.eu/gender-based-violence

• EIGE (2023) Gender Equality in Academia and Research – GEAR tool.
https://eige.europa.eu/gender-mainstreaming/toolkits/gear/measures-against-gender-based-violence-including-sexual-harassment?language_content_entity=en

• European Commission (2023) Gender equality in the EU
https://commission.europa.eu/system/files/2023-04/annual_report_GE_2023_web_EN.pdf

• European Council of UE, (2023) EU measures to end violence against women.
https://www.consilium.europa.eu/en/policies/eu-measures-end-violence-against-women/

• Fajmonová,V.; et al. (2021) UniSAFE. Report on the European Policy Baseline – https://zenodo.org/record/5780037

• Gallardo-Nieto, E.M., Gómez, A., Gairal-Casadó, R. et al. (2021). *Sexual orientation, gender identity and gender expression-based violence in Catalan universities: qualitative findings from university students and staff*. Arch Public Health 79, 16. https://doi.org/10.1186/s13690-021-00532-4

• Glick, P., Fiske, S.T., (1996) *The Ambivalent Sexism Inventory: Differentiating Hostile and Benevolent Sexism*. Journal of Personality and Social Psychology 70(3):491-512.

• Goldbach, EJ (2022). *'Gender' Doesn't Mean 'Female': Gender Minorities' Exclusion in Development Education as Ontological Violence*.
https://doi.org/10.17863/CAM.90577

• Griner, S. B., Vamos, C. A., Thompson, E. L., Logan, R., Vázquez-Otero, C., & Daley, E. M. (2020). *The Intersection of Gender Identity and Violence: Victimization Experienced by Transgender College Students*. Journal of Interpersonal Violence, 35(23-24), 5704-5725. https://doi.org/10.1177/0886260517723743

• Kalaca, S., Dundar, P. (2010) *Violence against women: The perspective of academic women*. BMC Public Health 10, 490.
https://doi.org/10.1186/1471-2458-10-490

• Kavanagh, E., Brown, L., (2020). *Towards a research agenda for examining online gender - based violence against women academics*, Journal of Further

and Higher Education, 44:10, 1379-1387, DOI: 10.1080/0309877X.2019.1688267

• Klugman, J., (2017). *Gender Based Violence and the Law*. World Development Report Background Paper; World Bank, Washington, DC. http://hdl.handle.net/10986/26198

• Lewis, R., & Anitha, S. (2023). *Upskirting: A Systematic Literature Review*. Trauma, Violence, & Abuse, 24(3), 2003-2018. https://doi.org/10.1177/15248380221082091

• Library of Congress (2023) European Union: Istanbul Convention Enters into Force. https://loc.gov/item/global-legal-monitor/2023-10-10/european-union-istanbul-convention- enters-into-force

• Ljubljana Declaration Gender Equality in Research and Innovation (2021) https://www.gov.si/assets/ministrstva/MIZS/Dokumenti/PSEU/Ljubljana-Declaration-on-Gender-Equality-in-Research-and-Innovation-_endorsed_final.PDF

• Medica Mondiale (2023) https://medicamondiale.org/en/violence-against-women/causes-and-consequences

• Mergaert, L., & Linková, M., & Strid, S., (2023). *Theorising Gender-Based Violence Policies: A 7P Framework*, Social Sciences, MDPI, 12(7), 1-13, June. https://ideas.repec.org/a/gam/jscscx/v12y2023i7p385-d1183058.html

• Nesbit, S., Carson, S., Ghura, S.,O'Brien, J., (2021). *A Project for Advocates for Youth. The Cost of Reporting: Perpetrator Retaliation, Institutional Betrayal, and Student Survivor Pushout*. https://www.knowyourix.org/wp-content/uploads/2021/03/Know-Your-IX-2021- Report-Final-Copy.pdf

• National Academies of Sciences, Engineering, and Medicine (2018) *Sexual Harassment of Women: Climate, Culture, and Consequences in Academic Sciences, Engineering, and Medicine*. Washington, DC: The National Academies Press. https://doi.org/10.17226/24994.

• Osuna-Rodríguez M, Rodríguez-Osuna LM, Dios I, Amor MI. (2020) *Perception of Gender-Based Violence and Sexual Harassment in University Students: Analysis of the Information*.

• Pandea, A.R., Grzemny, D., Keen, E. (2020). *Gender matters - A manual on addressing gender - based violence affecting young people*. Council of Europe.

• Piñeiro-Otero, Teresa; Martínez-Rolán, Xabier (2021). *Say it to my face: Analysing hate speech against women on Twitter*. Profesional de la información, 30(5), e300502. https://doi.org/10.3145/epi.2021.sep.02

• Rzecznik Praw Obywatelskich (2019) *Doświadczenie molestowania wśród studentek i studentów. Analiza i zalecenia RPO*. https://bip.brpo.gov.pl/pl/content/molestowanie-wsrod-studentek-i-studentow-analiza-i-zalecenia-rpo

• *Sources and Risk within a Relationship*. International Journal of Environmental Research and Public Health. 17(11):3754. https://doi.org/10.3390/ijerph17113754

• Sharoni, S. & Klocke, B. (2019). *Faculty Confronting Gender-Based Violence on Campus: Opportunities and Challenges*. Violence Against Women, 25(11), 1352–1369. - https://doi.org/10.1177/1077801219844597

• Scout, H., Anvar, H., (2022). *Gender Identity and Diversity in Oklahoma Sex Health Curriculum: Non-Binary Student Voices*. The University of Oklahoma. https://shareok.org/handle/11244/335540

• UniSAFE (2021) Gender-based violence and institutional responses: Building a knowledge base and operational tools to make universities and research organisations safe. Deliverable No. 3.1 Theoretical and conceptual framework. https://unisafe-gbv.eu/wp-content/uploads/2021/05/DT31_Theoretical-and-conceptual-framework_290421.pdf

• UniSAFE (2022) Gender-based violence and its consequences in European Academia. FIRST RESULTS FROM THE UNISAFE SURVEY. https://unisafe-gbv.eu/wp-content/uploads/2022/11/UniSAFE-survey_prevalence-results_2022.pdf

CHAPTER 9

THE VALUE OF DIVERSITY
JosAnn Cutajar, Janet Mifsud, Roderick Vassallo

INTRODUCTION: DIVERSITY AND MAINSTREAMING

Preamble

Diversity refers to the recognition and acceptance of differences among individuals and groups. These differences may be based on various characteristics, including but not limited to race, ethnicity, gender, sexual orientation, religion, disability, and socio-economic status. Embracing diversity involves acknowledging and valuing these differences, and creating an inclusive environment where everyone feels respected, supported, and empowered. In an academic context, diversity can enhance the learning experience by exposing students to different perspectives, ideas, and ways of thinking, and preparing them to navigate a diverse and interconnected world.

Organisations and companies that foster diversity and inclusivity create an environment where employees feel recognized and esteemed, resulting in heightened morale. By embracing a diverse and inclusive workforce, organisations can leverage the distinctive skills, experiences, and perspectives of their employees to drive innovation and improve overall performance (Anil 2022b). Workforce diversity was once limited to colour and gender diversity in the workplace. However, this concept has expanded and grown to include employees from diverse backgrounds to include gender, race, ethnicity, age, sexual orientation, social origin, socioeconomic status, and religion amongst other things. It also includes hiring employees with a range of skills, abilities, and disabilities (Anil 2022b; Lee 2020).

Diversity in academia

Diversity is a term that has gained increasing prominence in recent years,

particularly within the field of higher education. At its core, diversity is about embracing the unique qualities and perspectives of every individual, and creating an inclusive environment that fosters growth, creativity, and innovation.

The importance of diversity in higher education is rooted in the fundamental principles of equality and justice. As universities and colleges seek to prepare their students for leadership roles in an increasingly complex and interconnected world, they must create a learning environment that is inclusive, supportive, and reflective of the diverse perspectives and experiences of their students. This not only ensures that all students have equal access to educational opportunities, but it also enables universities and colleges to provide a more well-rounded education that prepares students to succeed in a diverse and changing global landscape (Milem 2002).

One of the most important aspects of diversity in higher education is the **representation of gender**. In recent years, there has been a growing recognition of the need to promote gender equality in higher education, including through the recruitment and retention of women in STEM fields. While there have been some notable advances in this area, much work remains to be done to address persistent gender disparities in academic and research opportunities.

For example, despite the growing number of women pursuing higher education, women continue to be underrepresented in many STEM fields, particularly in senior leadership positions. To address this, universities and colleges must make a concerted effort to provide women with the support, resources, and opportunities they need to succeed in these fields. This includes offering mentorship programmes, funding for research and travel, and flexible work arrangements that accommodate the needs of working mothers and other family caretakers.

Another aspect of diversity in higher education is the **representation of age**. As the population continues to age, universities and colleges must adapt to the needs and perspectives of an increasingly diverse student body. This includes providing programmes and resources that meet the needs of non-traditional students, including older adults who are returning to school after a hiatus, as well as older students who are seeking new career opportunities or retraining.

For example, many universities and colleges now offer flexible course schedules and online learning options to accommodate the needs of older students, who may have other commitments such as work or family. Additionally, some institutions have established programmes specifically designed

to support older students, including counselling services, mentorship programmes, and career development resources.

Another important aspect of diversity in higher education is the representation of **migrants and ethnic minorities**. In an increasingly interconnected and globalised world, universities and colleges must be prepared to support and engage with students from a wide range of cultural and national backgrounds. This includes providing resources and support such as language assistance and cultural orientation programmes for students who are new to the country, as well as resources and support such as cultural clubs and events for students who are from different cultural backgrounds.

For example, many universities and colleges have established international student centres that provide a wide range of services and resources to support students from abroad. These centres offer information and support on a wide range of topics, including immigration procedures, housing and transportation, and cultural adjustment. Additionally, some institutions have established partnerships with local organisations to provide additional support and resources to international students, such as mentorship programmes and internships.

Finally, the representation of **socio-economic backgrounds** is an important aspect of diversity in higher education. Universities and colleges have a critical role to play in creating opportunities for students from all backgrounds, regardless of their financial means. This includes providing financial aid, scholarships, and grants to ensure that students from low-income backgrounds have access to higher education.

In brief, diversity in higher education has an impact on the individual, the institution and on society (Milem 2002). These benefits can be summarised as follows. Diversity:

1. **Encourages creativity and innovation**: Diversity brings together different perspectives and ideas, which can lead to more creative and innovative solutions to problems.
2. **Enhances critical thinking**: A diverse student body exposes students to a variety of perspectives, helping them develop their critical thinking skills and challenging their assumptions.
3. **Promotes equity and inclusiveness**: Diversity helps to create an inclusive environment that supports and values the unique qualities and perspectives of every individual.

4.   Supports student success: Studies have shown that students from diverse backgrounds who attend schools and universities with a strong commitment to diversity are more likely to persist and graduate than their peers in less diverse environments (Stuart Wells et al., 2016).

5.   Prepares students for a global workforce: In an increasingly interconnected and diverse world, students must be prepared to work with people from a wide range of backgrounds and perspectives. Diversity in higher education helps prepare students for this reality.

6.   Fosters cross-cultural understanding: Diversity in higher education provides students with opportunities to interact with people from different cultural backgrounds, promoting cross-cultural understanding and breaking down cultural stereotypes.

7.   Enhances the academic experience: A diverse student body provides students with the opportunity to learn from and engage with people from different backgrounds, enriching the overall academic experience.

8.   Increases representation of underrepresented groups: Diversity helps to increase the representation of underrepresented groups in higher education, ensuring that all students have equal access to educational opportunities.

9.   Supports the development of a positive campus climate: A diverse and inclusive campus climate helps to foster a sense of community, reducing incidents of discrimination, prejudice, and harassment.

10.   Increases social and cultural awareness: Diversity in higher education promotes awareness and understanding of different cultures, helping to reduce prejudice and promote social and cultural harmony.

11.   Supports student retention: A diverse and inclusive campus can help to increase student retention, particularly for students from underrepresented groups who may feel isolated or unsupported in less diverse environments.

12.   Promotes interdisciplinary collaboration: Diversity in higher education can promote collaboration across different disciplines, leading to new and innovative approaches to research and problem-solving.

13.   Improves the quality of research: A diverse student body and faculty can help to improve the quality of research, as diverse perspectives can lead to new and innovative approaches to research questions.

14.   Supports faculty recruitment and retention: A commitment to diversity and inclusiveness in higher education can help to attract and retain a diverse faculty, which in turn can help to increase diversity among students.

15.   Supports the development of a more just and equitable society:

Promoting diversity in higher education can help to create a more just and equitable society by ensuring that all students have access to the educational opportunities and resources they need to succeed.

Diversity in the workplace

Diversity, Equality, and Inclusion (DEI) have gained immense importance in the corporate landscape globally. According to research conducted by **Glassdoor Economic Research**, there was a notable 37% rise in job openings related to DEI in the US, UK, France, and Germany in 2019 compared to the previous year (Zhao 2019).

Apart from being an ethical obligation, fostering an inclusive work environment also results in enhanced revenue growth and productivity. In today's increasingly interconnected and competitive world, prioritising diversity and inclusion in the workplace cannot be neglected. It is crucial to prioritise the satisfaction of both employers and employees.

Embracing diversity in the workplace, holds significant importance for organisations including higher education and research institutions. Firstly, it brings a broader range of perspectives and ideas, fostering innovation and creativity. A diverse workforce, consisting of individuals from different backgrounds and experiences, leads to better problem-solving and decision-making. Furthermore, organisations that prioritise diversity can attract and retain top talent from various demographic groups, resulting in a more skilled and versatile workforce. Inclusive workplaces that value diversity also create a sense of belonging and acceptance among employees, leading to increased morale and engagement. Additionally, diversity and inclusion contribute to improved customer relations by reflecting the diverse customer base and enhancing cultural understanding and communication. Organisations that prioritise diversity are seen as socially responsible, which improves brand reputation and customer loyalty. Moreover, embracing diversity allows organisations to tap into new markets and customer segments, fostering business growth and increasing market share. Diverse teams also cultivate a learning culture, exposing employees to different perspectives, experiences, and ideas, thereby enhancing personal and professional development. By valuing diversity and inclusion, organisations demonstrate equal opportunities for all employees, leading to higher satisfaction, loyalty, and reduced turnover. Lastly, embracing diversity and inclusion helps organisations comply with legal and ethical obligations related to equal employment opportunity and non-discrimination (Anil 2022a).

The benefits of diversity in the workplace

The benefits of embracing and prioritising diversity in the workplace are numerous and can be summarised as follows (Anil 2022b; Lee 2020).

Embracing diversity in the workplace offers a wide range of benefits that contribute to a thriving and successful organisation. By hiring people from diverse backgrounds, nationalities, and cultures, companies gain access to new perspectives, resulting in better problem-solving, increased productivity, and improved decision-making abilities. Diverse teams consider facts more thoroughly, leading to more innovative and data-driven decisions.

Moreover, a diverse workforce attracts a wider talent pool, as employees today seek not only a well-paying job but also a space where they can grow, feel accepted, and be challenged. Embracing diversity is particularly appealing to millennials and Gen Z, the most diverse generations in history. By embracing diversity in background, thought, ethnicity, and other factors, companies can tap into this broader talent pool and find the best candidates.

Workplace diversity also fosters more innovation. Homogenous teams tend to have similar thought patterns, life experiences, and problem-solving skills, limiting their ability to generate creative solutions. On the other hand, a diverse group of employees brings unique perspectives that can lead to breakthroughs in thought. Companies that score well on indicators of diversity tend to be more innovative and adaptive.

Creating an inclusive work environment where employees see a representation of various cultures, backgrounds, and ways of thinking leads to better employee performance. When individuals feel comfortable being themselves at work, they are happier and more productive. In contrast, a strong, homogeneous culture can stifle natural cognitive diversity and hinder employees from producing their best work. It is crucial to ensure that no unconscious biases seep into performance processes to fully tap into the benefits of diversity.

Furthermore, diversity has a direct impact on a company's profitability. Ethnically and culturally diverse companies are more likely to be successful, with higher financial returns compared to their non-diverse counterparts. Hunt et al. (2015) have shown that companies with diverse management teams and executive boards outperform industry averages. Diversity in the workplace also enhances brand reputation, as employers who accept and accommodate all backgrounds are seen as good companies, attracting top talent.

Additionally, a diverse workforce contributes to reduced employee turnover rates. Inclusive workplaces, where unique contributions are recognized and

acknowledged, boost employee satisfaction, comfort levels, and self-esteem. Diverse teams have higher morale, are more effective, innovative, and committed, leading to lower turnover rates.

In summary, embracing diversity in the workplace brings numerous advantages. It leads to new perspectives, a wider talent pool, increased innovation, better employee performance, higher profits, and reduced employee turnover (Lee 2020). By recognizing the value of diversity and fostering an inclusive environment, organisations can thrive and succeed in today's interconnected and globalised world.

The challenges of diversity in the workplace

Promoting diversity and inclusion in the workplace is a significant commitment for organisations today. However, it is not without its challenges. Several key obstacles need to be addressed to ensure successful implementation and foster a truly inclusive environment (Lee 2020, Anil 2022b).

1. Customising diversity practices to align with organisational goals

Implementing diversity initiatives requires tailoring them to fit your company's unique objectives. Instead of blindly adopting practices from other organisations, consider your existing strengths and focus on areas that align with your specific culture and goals. Conducting a diversity-focused survey can help identify gaps and guide your resource allocation to ensure meaningful impact.

2. Bridging the gap between design and implementation

Designing a comprehensive diversity programme is important, but it must be effectively implemented to make a difference. Securing leadership buy-in and ensuring that your team is prepared and supported is crucial for successful implementation. Consider appointing a dedicated Head of Diversity and Inclusion or exploring creative solutions like rotation programmes to hold the organisation accountable and drive results.

3. Training managers for diversity success

The success of diversity initiatives relies on the cooperation of everyone, especially managers who play a significant role in their implementation. Investing in management training helps them understand the importance of diversity goals, their expected behaviour towards employees, and the potential impact of their actions on the overall company culture. Partnering with companies that specialise in diversity training can provide valuable support in this area.

4. Addressing bias and promoting inclusivity

Humans are prone to bias, which can hinder inclusivity and create barriers in the workplace. Increasing diversity may lead to a rise in bias, discrimination, and harassment. It is essential to address unconscious bias through training, promoting awareness, and understanding common pitfalls. While bias may still exist, being aware of it and taking steps to avoid or address it can make a significant difference in fostering a more inclusive environment.

5. Overcoming internal resistance and fostering understanding

Not everyone may be receptive to the idea of workplace diversity, leading to internal resistance. It is important for leaders to continuously educate employees about the reasons behind diversity efforts and address any conflicts or lack of respect for diverse cultures and beliefs. Encouraging respect, acknowledgement, and comprehension of differences through diversity training can help build acceptance and collaboration among employees.

6. Effective communication across language barriers

In diverse workplaces, language and communication barriers can hinder effective collaboration and productivity. Providing language training for non-native English speakers and hiring bilingual or multilingual employees can help bridge these gaps and improve communication within the team.

7. Navigating cultural misunderstandings

Blending individuals from different cultures can lead to frequent misunderstandings. Creating an inclusive workplace that fosters understanding and respect for cultural differences can help mitigate these misunderstandings. By promoting a culture of acceptance and providing education on diverse cultures, team members can offer each other the benefit of the doubt and work together more harmoniously.

8. Promoting gender equality in the workplace

Gender inequality remains a significant issue, with women facing challenges in career advancement and representation in leadership positions (Gascoigne et al., 2022). Despite the passage of a century since women achieved the right to vote and the first election of women to parliament in certain EU nations, the evidence reveals an ongoing under-representation of women in politics and public spheres. This disparity is evident in the European Parliament, national parliaments, governmental bodies, and local assemblies (Shreeves and Boland 2021). Addressing this requires proactive efforts to eliminate bias and create

opportunities for women to thrive at all levels of the organisation. By clearly defining the organisation's commitment to gender equality, individuals who do not align with these values may self-select out, allowing for a more inclusive environment.

Mainstreaming diversity

Mainstreaming can be understood as the process of incorporating perspectives, needs, and experiences of individuals and groups who have traditionally been excluded or marginalised into the dominant culture or group. This involves recognizing and valuing the diversity of human experiences and actively working to challenge the existing power structures that perpetuate exclusion and marginalisation. Mainstreaming seeks to create a more inclusive and representative society by promoting equity and social justice through the integration of diverse perspectives and experiences. This can be achieved through the adoption of policies, practices, and systems that prioritise and centre the needs and voices of underrepresented groups. In an academic context, mainstreaming can involve rethinking the curriculum, research, and institutional practices to ensure that they reflect the diversity of human experiences and create a supportive and inclusive learning environment for all students.

Mainstreaming diversity in a societal context is beneficial due to the following arguments (Milem 2002; Anil 2022b; Lee 2020).

1. **Enhances creativity and innovation**: A diverse group of people brings different perspectives, experiences, and knowledge, which can lead to more creative and innovative ideas.

2. **Improves decision-making**: When diverse perspectives are included in the decision-making process, it leads to more informed and well-rounded decisions that take into account the needs and interests of a wider range of people.

3. **Fosters a more inclusive society**: Mainstreaming diversity helps to create a more inclusive and accepting society where everyone is valued and has equal opportunities to participate and succeed.

4. **Increases cultural understanding**: Exposure to diverse cultures, languages, and traditions helps to broaden people's understanding and appreciation of different ways of life, which can reduce misunderstandings and conflict.

5. **Boosts economic growth**: Diverse communities and workplaces have been shown to be more productive and profitable, which can contribute to overall economic growth.

6. Encourages social cohesion: Mainstreaming diversity helps to promote social cohesion by breaking down barriers between different groups and fostering a sense of shared identity and community.

7. Promotes fairness and equality: When diversity is mainstreamed, it helps to ensure that everyone is treated fairly and has equal opportunities, regardless of their background or identity.

8. Supports human rights: Mainstreaming diversity is an important aspect of promoting and protecting human rights, including the rights of minorities and marginalised groups.

9. Prepares people for a globalised world: In an increasingly interconnected world, it is important for people to have an understanding and appreciation of different cultures and perspectives to succeed in a globalised economy.

10. Reduces prejudice and discrimination: When diversity is mainstreamed, it helps to reduce prejudice and discrimination by challenging stereotypes and promoting mutual respect and understanding.

Applying these arguments in the context of academia and research institutions help us understand the following benefits to students and staff of these institutions.

1. Improves academic performance: A diverse and inclusive learning environment can help students feel more engaged and motivated, leading to improved academic performance and higher graduation rates.

2. Enhances critical thinking: Exposure to diverse perspectives and experiences can help students develop critical thinking skills and learn to approach problems from multiple angles.

3. Increases cultural competency: Mainstreaming diversity in academic and research settings can help students develop a deeper understanding of different cultures and improve their ability to navigate a diverse world.

4. Promotes research and scholarship: Including diverse perspectives in research and scholarship can lead to more comprehensive and accurate results, thereby promoting a more thorough understanding of complex issues.

5. Promotes social justice: Mainstreaming diversity in academia can help promote social justice by addressing issues of equity and inclusion, challenging power structures that perpetuate inequality, and creating opportunities for marginalised groups to succeed.

6. Prepares students for a diverse workforce: In today's globalised economy, it is increasingly important for students to have experience working

in diverse environments, and mainstreaming diversity in academia can help prepare them for this.

7. Fosters a sense of community: Mainstreaming diversity in academic and research settings can help create a sense of community among students and faculty by promoting mutual respect and understanding and creating opportunities for dialogue and collaboration.

8. Supports student wellbeing: Creating a supportive and inclusive learning environment can help students feel more connected, valued, and supported, leading to improved mental health and well-being.

9. Increases cultural capital: Exposure to diverse perspectives and experiences can help students develop cultural capital, or the knowledge and skills needed to navigate diverse social and cultural contexts.

10. Promotes lifelong learning: Mainstreaming diversity in academic and research settings can help foster a culture of lifelong learning by encouraging students to continue exploring new ideas, perspectives, and experiences beyond their formal education.

Applying mainstreaming to specific areas of study

(i) *STEM (Science, Technology, Engineering and Mathematics) disciplines.*
Diversifying STEM curricula: Mainstreaming diversity in STEM can involve integrating diverse perspectives and experiences into course materials and assignments, including readings and case studies that highlight contributions by underrepresented groups in science and technology.

Increasing representation in STEM fields: Mainstreaming diversity in STEM can involve creating targeted recruitment and retention programmes to increase the participation of underrepresented groups in STEM fields, as well as providing mentorship and support to help students from diverse backgrounds succeed.

Addressing bias and stereotypes: Mainstreaming diversity in STEM can involve addressing implicit biases and stereotypes that may limit the opportunities available to individuals from underrepresented groups, promoting awareness and understanding of different cultural norms and practices.

Encouraging interdisciplinary research: Mainstreaming diversity in STEM can involve promoting interdisciplinary research that incorporates perspectives and expertise from a variety of fields, including social sciences and humanities, to address complex societal challenges.

Creating inclusive STEM environments: Mainstreaming diversity in STEM can involve creating inclusive environments that foster a sense of belonging for individuals from diverse backgrounds, including providing resources and support for students and faculty, and promoting a culture of respect and inclusion in the classroom and laboratory.

(ii) *Education and Pedagogy*

Incorporating diverse perspectives into teacher education: Mainstreaming diversity in the faculties of education and pedagogy can involve incorporating diverse perspectives and experiences into teacher education programmes, including courses and training on culturally responsive teaching and classroom management strategies that support students from diverse backgrounds.

Promoting inclusive teaching practices: Mainstreaming diversity in the faculties of education and pedagogy can involve promoting inclusive teaching practices, such as creating classroom environments that are welcoming and supportive for all students, using inclusive language, and providing accommodations for students with diverse needs.

Addressing issues of equity and access: Mainstreaming diversity in the faculties of education and pedagogy can involve addressing issues of equity and access, such as providing resources and support to students from marginalised groups and advocating for policies and practices that promote educational equity.

Engaging with diverse communities: Mainstreaming diversity in the faculties of education and pedagogy can involve engaging with diverse communities, including partnering with community organisations and local schools to promote cultural exchange and support the needs of underrepresented students.

Integrating diverse perspectives into research and scholarship: Mainstreaming diversity in the faculties of education and pedagogy can involve integrating diverse perspectives into research and scholarship, including conducting studies that explore the experiences of underrepresented students and examining the impact of cultural factors on teaching and learning outcomes.

(iii) *Social Wellbeing*

Diversifying curricula: Mainstreaming diversity in faculties for social wellbeing can involve diversifying the curricula to include a range of topics and

perspectives that reflect the experiences and needs of diverse communities, including those that are often underrepresented in social work and related fields.

Increasing representation in leadership and decision-making roles: Mainstreaming diversity in faculties for social wellbeing can involve increasing representation of individuals from diverse backgrounds in leadership and decision-making roles, including faculty, staff, and administration, to help ensure that policies and practices are inclusive and responsive to diverse needs.

Providing culturally responsive training and education: Mainstreaming diversity in faculties for social wellbeing can involve providing training and education that is culturally responsive and relevant to the experiences and needs of diverse populations, including those from marginalised and underrepresented communities.

Promoting equity and social justice: Mainstreaming diversity in faculties for social wellbeing can involve promoting equity and social justice by addressing issues of discrimination and marginalisation, and advocating for policies and practices that promote inclusion and empowerment.

Creating inclusive and supportive environments: Mainstreaming diversity in faculties for social wellbeing can involve creating inclusive and supportive environments that promote a sense of belonging for students and faculty from diverse backgrounds, including providing resources and support to help students succeed, and promoting a culture of respect and inclusion.
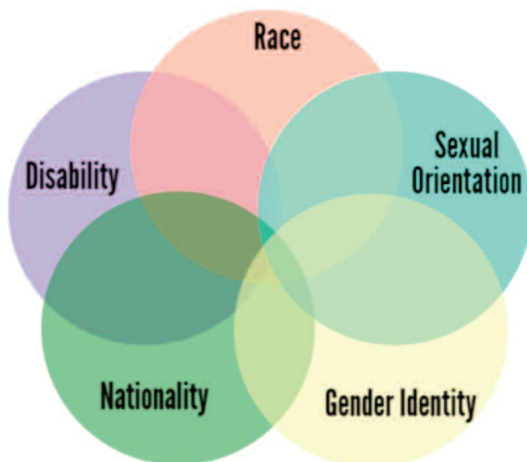
DIVERSITY AND INTERSECTIONALITY

Intersectionality is a concept that recognizes **how different aspects of a person's identity**, such as their race, gender, sexuality, religion, class, and ability, intersect and **interact with one another, creating unique experiences of privilege and/or oppression**.

"Intersectionality is the idea that multiple identities intersect to create a whole that is different from the component identities. In other words, the whole is greater than the sum of its parts." - Kimberlé Crenshaw, American civil rights advocate and scholar who coined the term *intersectionality* in 1989.

In the context of diversity, equality, and inclusion, intersectionality highlights the importance of recognizing and valuing the diversity of individuals and groups, and understanding how multiple forms of discrimination and marginalisation can impact them.

The importance of an intersectional approach

It is important to understand intersectionality because it helps us to better understand the experiences of people who belong to **multiple marginalised groups**, and how those experiences can be different from those of individuals who only belong to a homogenous group. For example, a person who is both a woman and black may face different forms of discrimination than a white woman or a black man.

By acknowledging and addressing intersectionality, we can work towards creating more inclusive and equitable environments that value and respect the diversity of all individuals. This can involve implementing policies and practices that account for the different experiences and needs of marginalised groups, and promoting a culture of allyship and solidarity that recognizes and addresses intersecting forms of oppression.

The following examples may show how intersectionality can help us understand social inequality.

(i) Racial or ethnic background

Intersectionality can help us understand the unique experiences of discrimination and marginalisation faced by individuals who belong to multiple racial or ethnic groups. For example, a person who is both black and LGBTQ+ may face discrimination not only for their race, but also for their sexual orientation or gender identity, leading to a compounding effect of oppression.

One example of intersectionality in this context is the experience of Marsha P. Johnson, a Black transgender woman and activist. Johnson was a prominent figure in the Stonewall uprising and fought tirelessly for LGBTQ+ rights, but also faced discrimination and marginalisation as a black person and a transgender woman. Her intersectional identity and activism helped shed light on the unique experiences of discrimination and violence faced by individuals who belong to multiple marginalised groups.

Another example of intersectionality can be seen in the experiences of Afro-German women, who face discrimination not only for their gender, but also for their racial or ethnic background. These women are often subject to stereotyping, racism, and sexism, and face unique barriers in accessing education, employment, and healthcare in Germany. One prominent Afro-German activist is May Ayim, who wrote extensively about her experiences as a Black woman in Germany and helped raise awareness about intersectionality in the country.

(ii) Gender identity and racial background

For instance, a transgender woman who is also a black woman, may face discrimination not only for her gender identity, but also for her race or ethnicity, leading to a unique experience of oppression that is different from that of a white transgender woman or a cisgender black woman.

An example in this respect is the experience of Laverne Cox, a transgender woman and actress who is also black. Cox has spoken extensively about the unique challenges faced by black transgender women, who often face high rates of violence, discrimination, and poverty. Her advocacy and visibility as a black transgender woman have helped raise awareness about the intersecting forms of oppression faced by individuals who belong to multiple marginalised groups.

In Europe, the experiences of Muslim women who wear the hijab or other forms of religious clothing needs to be taken into consideration. These women may face discrimination not only for their gender, but also for their religious and racial identity. For instance, in France, a ban on wearing religious symbols in public schools has been criticised for disproportionately affecting Muslim girls and women who wear the hijab. Intersectional feminist activists, such as Saida Grundy and Sara Salem, have highlighted the need to recognize the unique experiences of Muslim women in the fight for gender equality.

(ii) Age

Intersectionality can also help us understand the experiences of individuals

who face discrimination based on their age as well as other factors, such as race or gender. For example, an older woman who is also a black person may experience ageism as well as racism and sexism, leading to a compounding effect of discrimination and marginalisation based on multiple intersecting identities.

Grace Lee Boggs was a Chinese American philosopher, and activist who fought for civil rights and labour rights throughout her life. Boggs faced discrimination based on her race as well as her age, but her intersectional identity also gave her a unique perspective on the struggle for social justice. In her later years, she focused on intergenerational activism and worked to bridge the gap between older and younger activists in the fight for social change.

Other examples in Europe can be seen in the experiences of older women, in their 50s and 60s who are seeking employment but may face ageism as well as sexism and may be more likely to experience long-term unemployment and poverty. Intersectional feminist activists and scholars in Ireland, such as Helen Russell, have advocated for policies that address the unique challenges faced by older women in the workforce.

Intersectionality and the Gender Pay Gap

It is also important to apply the concept of intersectionality in relation to the gender pay gap and recruitment as it helps us understand that gender is not the only factor that has an impact on these issues. By recognizing that individuals can face multiple forms of discrimination and disadvantage, we can develop more effective policies and strategies that address the specific needs and experiences of diverse groups.

Other factors such as race, ethnicity, age, disability, sexual orientation, and gender identity can also play a role in determining an individual's pay. Black women often face greater pay disparities than white women due to the intersecting effects of racism and sexism. By acknowledging and addressing these multiple forms of discrimination, we can develop more comprehensive and effective strategies for closing the gender pay gap.

Similarly, applying an intersectional lens to recruitment can help us to understand that gender is not the only factor that affects who gets hired and who does not. Other factors such as race, ethnicity, class, education, disability, and cultural background can also impact an individual's access to employment opportunities. For example, similar studies have shown that black women are often underrepresented in leadership positions due to the intersecting effects

of racism and sexism in hiring and promotion practices. By recognizing and addressing these intersecting forms of discrimination, we can create more inclusive and equitable recruitment processes that value diversity and inclusion.

Intersectionality at the service of society

Governments can take several concrete steps to apply the principle of intersectionality and reduce inequality. Here are some examples:

1. **Collect and analyse disaggregated data** that captures the experiences of diverse groups. This can help identify patterns of discrimination and disadvantage that may be overlooked when data are only collected on a single dimension, such as gender. For example, collecting data on the intersection of gender and race can help identify pay disparities that affect black women. By using this data to inform policy development, governments can ensure that their efforts to address inequality are more targeted and effective.

2. **Develop targeted policies and programmes** that address the specific needs and experiences of diverse groups. For example, governments can provide funding for programmes that support black women in entering and advancing in male-dominated fields, such as science and technology. They can also develop policies that address the unique challenges faced by older women in the workforce, such as ageism and discrimination. By tailoring their policies and programmes to the specific needs of diverse groups, governments can ensure that their efforts to reduce inequality are more equitable and effective. Policies may be developed in consultation with civil society and workers' unions to ensure a more effective targeting and give more positive results.

3. **Engage in intersectional advocacy and outreach** to raise awareness about the importance of intersectionality and promote policies that address the intersecting forms of discrimination that affect diverse groups. This can include partnering with community organisations and advocacy groups to develop and implement policies that reflect the needs and priorities of diverse communities. Governments can also work to build alliances across different communities to promote shared goals and build solidarity in the fight against inequality.

Overall, applying the principle of intersectionality requires a concerted effort by governments to recognize and address the unique challenges faced

by diverse groups. By taking concrete steps to collect desegregated data, developing targeted policies and programmes, and engaging in intersectional advocacy and outreach, governments can work to reduce inequality and build more inclusive societies.

In reducing pay gaps, already a complex issue in itself, governments may require a multi-faceted approach. Here are some specific steps that governments can take to reduce pay gaps:

1. **Enact and enforce strong pay equity laws** that require employers to pay employees fairly for their work, regardless of their gender, race, ethnicity, or other characteristics. For example, governments can require employers to conduct regular pay equity analyses to identify and address any pay disparities that exist within their organisations.

2. **Increase transparency around pay** by requiring employers to disclose salary ranges for different positions and to report on their efforts to address pay gaps. This can help to ensure that employees are paid fairly and that pay disparities are identified and addressed in a timely manner.

3. **Promote flexible work arrangements**, such as telecommuting, flexible schedules, and job-sharing, that enable employees to balance work and family responsibilities. This can help to reduce the impact of gender-based pay disparities that can result from women taking time off or working part-time to care for children or other family members. It can also be helpful for persons with disabilities who might need to take breaks every few hours for health reasons.

4. **Provide training and education** to employers, employees, and trade unions on the importance of pay equity and how to identify and address pay disparities. This can help to raise awareness about the issue and ensure that employers have the knowledge and tools they need to address pay gaps within their organisations.

5. **Increase representation of underrepresented groups**, such as women and black people, in leadership positions and in higher-paying industries. They also need to be represented in trade unions. This can help to address the root causes of pay gaps and promote greater diversity and inclusion in the workforce.

Overall, reducing pay gaps requires a sustained and coordinated effort from governments, employers, trade unions and employees. These efforts

may contribute to help ensure that all employees are paid fairly and have equal opportunities to succeed in the workplace.

The role of universities and research institutions

Higher education institutions, such as universities, play a crucial role in promoting diversity, equality, and inclusion in society. As centres of knowledge production and dissemination, universities have the responsibility to not only educate students but to also contribute towards shaping public discourse and policy on issues of social justice.

In relation to an intersectional approach, universities can promote and advance intersectionality through a variety of means. Here are a few examples:

1. Curriculum development to reflect diverse perspectives and incorporate intersectional approaches across all disciplines. This can include:

   a. Incorporating diverse readings and examples in course materials, such as using texts by and about people from different cultural, racial, gender, disabilities, and socio-economic backgrounds.

   b. Encouraging classroom discussions on topics such as race, gender, sexuality, disability, and social justice, and creating a safe space for all students to express their opinions and experiences.

   c. Designing courses and programmes that specifically address intersectionality and social justice issues, such as a course on "Intersectionality and Inequality" or a programme on "Social Justice Studies".

2. Research that addresses issues of intersectionality and social justice. This can include:

   a. Supporting research on intersectionality and social justice issues, such as funding research on the experiences of marginalised communities or promoting research collaboration across disciplines and with different community partners.

   b. Incorporating an intersectional lens in research design and analysis, such as exploring how the intersection of gender, race, and socio-economic status impacts health outcomes or examining how policies impact different communities differently.

   c. Encouraging the use of intersectional frameworks in research, such as using the "matrix of domination" to analyse how various forms of oppression intersect in the experiences of marginalised communities.

3.   Campus culture and policies need to be developed to create inclusive and equitable environments that reflect an intersectional approach. This can include addressing issues such as campus climate, discrimination, and sexual harassment, as well as promoting diversity and inclusion initiatives, and engaging with marginalized communities in decision-making processes.

Overall, universities have the potential to be important agents of change in promoting intersectionality, diversity, and equality in society. Overall, promoting an intersectional approach in teaching and research can help universities create a more inclusive and equitable environment for students and staff, while also contributing to the development of knowledge that is relevant and responsive to the needs and experiences of diverse communities.

SUGGESTED METHODS OF INVESTIGATION WITH EXAMPLES

Research methods that may be employed in studies related to the field of diversity and intersectionality, include but are not limited to:
– Quantitative research based on questionnaires and surveys
– Qualitative research based on interviews and focus groups
– Literature review
– Expert interviews
– Researching legal texts
– Statistical analysis

Examples of Research in the Area of Diversity

Study 1. **Race in the UK workplace: The intersectional experience** is an article and collaborative effort by Sundiatu Dixon-Fyle, Klaudia Gegotek, Tania Holt, Tunde Olanrewaju, Dara Olufon, Nyasha Tsimba, and Ammanuel Zegeye, representing views from the McKinsey Institute for Black Economic Mobility. This research was carried out in the United Kingdom between 2022 and 2023.

The focus of the article are Black, Bangladeshi, and Pakistani groups (hereafter referred to as BBP). The authors found that BBP people in the United Kingdom were the furthest behind on pay and labour force participation.

Data analysis was carried out on the UK Annual Population Survey spanning 2012 to 2022. To approximate the experiences of the BBP population in the labour market, the researchers conducted a survey of 2,758 respondents across all ethnicities, with an additional boost for the BBP population. To obtain a view on the lived experiences of BBP women and provide a

preliminary assessment of the field-tested diversity, equity, and inclusion (DEI) solutions, the authors conducted interviews with nearly a dozen HR executives and everyday workers who agreed to share some of their experiences and lessons learned on DEI efforts. The analysis relied on several data sources, which were augmented with proprietary research in the form of surveys and in-depth interviews.

The article presents the following results: i) Two-thirds of companies have high female representation, but only 50% have high ethnic-minority representation, ii) BBP women are more vulnerable and fare worse than White women and BBP men across pay and labour participation, iii) younger BBP generations are driving improvements in pay and participation, iv) young BBP women now earn as much as or more than White men of the same age , v) BBP women aged 16 to 25 are securing more higher-paying jobs than they were a decade ago, vi) BBP women aged 26 to 55 have seen little progress in their participation in higher- and lower-paying occupations, vii) Black women nearing the end of their careers are more likely to rent than own their home, viii) White women retire earlier than BBP women overall, while Black women keep working the longest and ix) achieving pay and representation parity for BBP women could increase their average annual salary by nearly 30%.

Particularly interesting is how the article explores four actions on how UK companies can make progress on racial equity in the workplace. This study can be used as a form of monitoring and/or evaluation.

• **Source**: https://www.mckinsey.com/bem/our-insights/race-in-the-uk-workplace-the-intersectional-experience?cid=other-eml-dre-mip-mck&hlkid=6a56712a00854236947e707c3dd93b31&hctky=12660722&hdpid=c73d766a-9eef-4f74-bcea-d7b7295192e0

Study 2. **The intersectional effect of age and gender on the work-life balance of managers** is a study carried out in the United States of America with data being collected between 2010 and 2015. Although there is a small body of empirical research on the working lives of managers, both the popular media and the academic literature tend to ignore the distinct ways that role identities such as age and gender intersect to create a complex work-life interface for diverse managers. This gap is especially surprising considering that managerial roles are defined by unique demands and expectations that

likely intersect with the differential life course shifts experienced by men and women, which has the potential to create specific challenges across the work and life domains of managers. The current study aims to address this gap through an intersectional examination of the non-linear effects of age and gender on the work-life balance of managers.

A sample of 421 managers in the USA was involved in the study. Participants included managers from the United States of America who took part in a development programme administered by a large leadership development firm within the USA.

The authors apply statistical tests of the incremental validity of non-linear interaction terms to examine the complex relationship between age, gender and work-life balance. Results support a non-linear U-shaped main effect of age on leader work-life balance. This effect is moderated by gender, however, with a non-linear U-shaped effect of age on work-life balance being supported for male managers – with female managers displaying no effect of age on work-life balance.

Particularly interesting is that based on these findings, the authors highlight the need for increased availability of flexible schedules and employee empowerment for managers as well as general employees. This study can be used as a form of evaluation.

- **Source**: Thrasher, G.R., Wynne, K., Baltes, B. e Bramble, R. (2022). *The intersectional effect of age and gender on the work-life balance of managers*, Journal of Managerial Psychology, 37(7), 683-696.
https://doi-org.ejournals.um.edu.mt/10.1108/JMP-03-2021-0169

Study 3. **Inequity in disability pension: an intersectional analysis of the co-constitution of gender, education and age** is a study that was carried out in Western Norway around 2017. Social position, education, gender and increasing age are all identified as important risk factors for disability pension. This study takes an intersectionality approach and examines their co-constitution, in relation to inequity in disability pension.

The population involved in the study included 22,203 middle-aged men and women that had participated in the community-based Hordaland Health Study, Western Norway (1997-1999). The participants were categorised in four exposure groups: higher educated men, higher educated women, lower educated men and lower educated women. The population eligible for the

study were participants in the Hordaland Health Study (HUSK; N = 22,203, 65% of the invited), a community-based study. Invited individuals consisted of all citizens born in 1953-1957 living in Hordaland County, Western Norway as well as those born in 1950-1951 who had previously (1992-1993) participated in the Hordaland Homocysteine Study. At baseline (1997-1999), all participants underwent a brief physical examination and completed questionnaires including socio-demographic information, health status, and health-related behaviours. HUSK was a collaboration between the National Health Screening Service, the University of Bergen and local health services. The sample of the disability pension was elicited from a national registry and covered 1992 to the end of 2007.

The main research tool was statistical analysis. Using recommendations for intersectionality-informed quantitative research, the researchers estimated the main effects of gender and educational attainment on disability pension, and potential statistical multiplicative interactions between gender and education in relation to cause-specific and all-cause disability pension. For all-cause disability pensions, men with higher education had the lowest risk for disability pension (rate per 1000 person-years: 2.01) during the course of working life (from age 35 to 57), followed by higher educated women (rate 3.56), and lower educated men (rate 4.59). Finally, women with lower education had a substantially increased risk already in early middle age (rate 8.39). The researchers found a statistical multiplicative effect of lower education and female gender on all-cause disability pension and disability pension with musculoskeletal disorders compared with men with higher education.

The discussion highlights that inequity in disability pension is not only about defining vulnerable groups, but also about understanding how privileges and disadvantages are unequally distributed. The researchers argue that incorporating an intersectionality approach in population health research may better capture the lifeworld of social groups, and thereby provide knowledge that is more accurate and suitable to developing preventive policies. This study can be used as a form of evaluation.

• **Source**: Haukenes, I., Löve, J., Hensing, H., Knudsen, A.K, Øverland, S., Vahtera, J., Sivertsen, B., Tell, G.S. & Christoffer Skogen, J. (2019). *Inequity in disability pension: an intersectional analysis of the co-constitution of gender, education, and age*. The Hordaland Health Study, Critical Public Health, 29(3),

Study 4. **Ethnicity, gender, and intersectionality: How context factors shape the intersectional (dis)advantage under proportional representation rules** is research carried out between 2018 and 2021 in Brussels, Belgium.

The article aims to highlight the contextual impact of proportional representation (PR) rules on the intersectional representation of gender and ethnic groups. The researchers assert that the combination of the institutional and sociodemographic context generates barriers and opportunities for the inclusion of intersectional identity groups in politics. The researchers analysed how the socio demographic makeup of the district electorate influences parties' and voters' behaviour within PR systems to shape electoral outcomes in the Brussels local elections. They focused on parties' list composition strategies and candidates' personal score to determine parties' and voters' leverage on representational outcomes.

Brussels was an ideal setting to study intersectional representation because the political inclusion of ethnic minorities is an extremely salient and politicised issue while legally binding gender quotas ensure equal gender representation on party lists. This generates incentives and constraints for parties to include ethnic minorities and women. Moreover, local elections take place in 19 municipalities with varying levels of ethnic minority groups concentration across the Brussels region.

The focus of the research was on Maghrebian origin candidates because they are the most important extra-European minority group among candidates, and within the Brussels population.

The electoral data analysis is based on a large dataset including 10,124 candidates, 298 party lists and 19 municipalities over 3 local elections (2006, 2012, and 2018) in Brussels. Parties tend to nominate more ethnic minority candidates among male candidates than among female candidates. Maghrebian origin candidates make up about 9% of all male candidates and about 7% among women. The gender gap is wider among elected candidates, as men again outnumber women.

This research demonstrates that ethnic minority male and female candidates experience a similar advantage on their ethnic majority counterparts in the

(s)election process, and that their advantage grows as districts get more diverse. The research shows that ethnic minority candidates' advantage comes mainly at the expense of ethnic majority women, while ethnic majority men's dominant position is not affected by the sociodemographic context.

The study overall calls for a clear definition of intersectional categories and the social cleavage(s) they represent within societies in order to understand political inequalities and opportunities. This study can be used as a form of evaluation.

- **Source**: Janssen, C. (2022). *Ethnicity, gender, and intersectionality: How context factors shape the intersectional (dis)advantage under proportional representation rules*. Politics, 42(3), 289–308. https://doi-org.ejournals.um.edu.mt/10.1177/0263395721997676

Study 5. **Equality, Diversity, and Inclusion Strategies Adopted in a European University Alliance to Facilitate the Higher Education-to-Work Transition** was carried out across the European Union and then published in 2022.

This article proposes a comprehensive approach to promote EDI within the EUA ULYSSEUS. When the obligation of providing a GEP to qualify for funding under Horizon Europe was announced, the Taskforce from the Work Package 5 aimed at creating a Project Gender Equality Agenda. Not all ULYSSEUS Universities had a GEP at this stage, and Taskforce participants felt that reciprocal support was needed to reach this goal. The work to be done to promote gender equality, diversity, and inclusion in ULYSSEUS was, therefore, reshaped, following the new Horizon Europe concept of gender+ and the new request to apply a gender dimension, so that it could be integrated, where possible, into future GEPs. They applied EDI principles at project level. They felt that implementing these values through visible micro-actions could document and counteract the disadvantages underrepresented groups face in academia. They felt that adopting EDI in micro-actions could facilitate the higher education-to-work transition of non-traditional students.

Spanish, Italian, Austrian, French, Finnish, and Slovakian universities were involved in this purposive sample, namely the University of Genoa (UniGE) together with five other European universities: University of Seville (Spain), Université Côte d'Azur (France), Technicka Univerzita v Kosiciach (Slovakia), Management Centre Innsbruck (Austria) and Haaga-Helia University (Finland).

The authors used documentary analysis and their academic expertise in promoting strategies connected with the European values enshrined in Article 2 of the Treaty on European Union: pluralism, tolerance, justice, solidarity, non-discrimination, and equality. To identify the micro-actions, a qualitative research technique, the focus group, was chosen because of its technical potential, which derives from the exploratory capabilities inherent in the interactive, verbal, and non-verbal communication of small groups. In the study presented, the objective consisted in the detailed description and knowledge of the phenomenon investigated (EDI within the alliance and possible developments) and there was no interest in generalisations. The pursuable goal was not to lead the group toward decision-making, nor to seek consensus on a topic. In the end, the taskforce participants chose the micro-actions from an initial list of possible actions provided by the Task leader, adding others that were deemed relevant at local level or significant at consortium level.

Currently, there is no direct link between the importance of valuing and incrementing inclusion, raising awareness of equality, diversity, and inclusion (EDI) strategies and policies, and the transition from HE to work. This paper contributes to filling this gap through a case study in which micro-actions related to EDI are enacted at the international level in a European University Alliance (EUA) through an innovative strategy unseen in other EUAs. The choice of a new strategy not directly related to facilitating young people's transitions from education to employment is due to the awareness of the importance of using any available strategy to address the topic. Other academic initiatives address the HE-to-work transition directly but adding new perspectives and strategies may help understand EDI's importance in working and life contexts throughout life, further enhancing students' employability competencies and integrating current strategies aimed at other skills.

The limitations of GEPs were pointed out. EDI is the beginning of a process that needs continuous and rigorous monitoring. Work labelled as EDI focuses, very often, solely on supporting diversity efforts. In academies, for example, it is limited to increasing the representation of vulnerable and/or underrepresented groups in various roles but does not stimulate exploration of the ways in which current work structures and practices allow injustice to flourish. One example is the language used; using words with different meanings as synonyms, such as "equality" and "equity", "diversity" and

"inclusiveness". This confusion of terminology creates a false sense of individual and institutional progression and helps to mask systemic injustices. The acronym "EDI" itself is a nebulous term that brings together three distinct ideas, "diversity", "equality", and "inclusivity", linked in complex and articulate ways that require deep reflection in their application in the contemporary educational and social context. Treating EDI as a complete package and not as separate entities risks leading to the erroneous belief that respecting diversity will automatically guarantee "inclusion" and "equality" and vice versa. Increasing the representation of minority groups demonstrates an effective commitment to change, but this is not enough; academia needs to be open to learning more from community relationships, both inside and outside the institution, and to initiate an effort that is not individual, but community based. This study can be used as an evaluation of EDI.

- **Source**: Siri, A.; Leone, C.; Bencivenga, R. *Equality, Diversity, and Inclusion Strategies Adopted in a European University Alliance to Facilitate the Higher Education-to-Work Transition*. Societies 2022, 12, 140. https://doi.org/10.3390/soc12050140

Study 6. **Curriculum co-creation as a transformative strategy to address differential student outcomes: the example of Kingston University's Student *Curriculum Consultant Programme***, is a paper published in 2019, that examines the role that curriculum co-creation can play in creating a more inclusive higher education and, in so doing, addresses the complex challenge of differential student outcomes and attainment. It achieves this by exploring Kingston University's Student Curriculum Consultant Programme (SCCP), an integral part of the institution's Inclusive Curriculum Framework (ICF). Students who work as Curriculum Consultants use their own diverse lived experiences and Kingston University's ICF to collaborate with staff to create more accessible, meaningful and globally-relevant curricula at all levels of the institution. The consultants work with staff in a variety of ways to address potential barriers in the curriculum. This paper examines three instances of co-creation facilitated through the SCCP. The paper argues that this programme acts as a mechanism through which the institution can legitimately, actively endorse and encourage co-creation in order to create more inclusive curricula.

Kingston University's Student Curriculum Consultant Programme, non-traditional (on the basis of socio-economic status, age as well as black, and minority ethnic) students who work as Curriculum Consultants were involved in this study. The main research tool of this purposive sample was action research through a feedback survey and interview.

Academics remain the principal gatekeepers of curricula in HE. There is a growing recognition of the role that students can play in curricular co-creation which, in turn, contributes to teaching excellence. Kingston University tried to do away with this by setting up an Inclusive Curriculum Framework which ensures that staff work with students to create inclusive curriculums. Curriculum Consultants are undergraduate and graduate students, trained and supported by academic and professional staff to share with academic course teams and professional services their diverse perspectives on curricula. They use the principles of the ICF to review course materials and discuss how a particular course or module can work toward becoming more inclusive of and accessible to the diverse student body. The 2016-2017 pilot programme trained more than 80 student consultants. Evaluation of this programme suggested that fewer, more robustly trained consultants would be more effective. The evaluators of this programme maintained that eight undergraduate Curriculum Consultants and two Senior Consultants (Level 7 Masters students) as leaders would be enough. These were paid roles, so that students who might not, for time and money reasons, undertake them on a voluntary basis would be encouraged to participate and offer their perspectives. The appointees represented such institution-wide courses as visual arts, social sciences, business and maths. Those engaged had to fulfil the key criteria of commitment to equality and the desire to contribute to making the University more inclusive. The two Senior Consultants took responsibility for mentoring the others as well as for speaking publicly and delivering workshops, in both of which opportunities they supported their team to share.

A week after the different course teams met the consultants, they were provided with a feedback survey containing open-ended questions focused on how their understanding of inclusion had developed and what changes they had already made or planned to make as a result of connecting with the consultants. Subsequently, the course teams were interviewed to assess the programme's longer-term impact and logged curricula transformation resulting from the teams' engagement with the consultants; at the same

time, the researchers identified case studies of change that might be shared more widely across the University. Finally, to gain an even deeper understanding of how the programme had operated all participating staff were asked to take part in a twenty-minute interview to glean their personal experiences of the programme.

Particularly interesting is the involvement of non-traditional students as curriculum consultants, and the fact that they were paid. This study is a good example of an evaluation of a programme.

• **Source**: Livingstone Hughes, A., Michener, C., Mohamed, K., McDuff, N. (2019). *Curriculum co-creation as a transformative strategy to address differential student outcomes: the example of Kingston University's Student Curriculum Consultant Program.* Compass: Journal of Learning and Teaching, 12(1).
https://journals.gre.ac.uk/index.php/compass/article/view/955/pdf

Study 7. **Burning Bikinis** is a research study carried out by aditus foundation, human rights NGO based in Malta, in collaboration with Subway Lab. The final product, a documentary entitled **Burning Bikinis**, was launched in 2017.

Burning Bikinis takes its cue from the introduction of the bikini into Maltese seaside culture in the early to mid-60s, and the social and religious furore that surrounded it. The project reflected on this period in the light of female emancipation in Malta and the various actors that had and still may have a role today. The project starts with the bikini, a seemingly frivolous piece of clothing, in order to explore the social and cultural impact it had on Maltese society from a gender perspective.

The Burning Bikinis project explores feminism in Malta from a historical perspective by looking at events that happened in Malta, through talking to those who lived it and adopting an introspective voice by inviting Malta to reflect on today's role of women in the community.

The interviews were conducted with Ms Renee Laiviera, then Commissioner of the National Commissions for the Promotion of Equality and an exponent of the feminist movement of the 70-80s in Malta; Ms Gaby Calleja, a major exponent in LGBTIQ activism in Malta; Prof. Dominic Fenech, professor of history at the University of Malta; Mr Toni Terribile, local expert of the Diocese of Malta; Ms Maria Grech Ganado, popular poet and common people who lived through the era.

The project leaders approached the individuals involved in the documentary based mainly on their expertise. Any documents and letters presented in the documentary were researched in the National Archives directly. The first phase of the project consisted of extensive research on the period in question, whilst consulting with key actors to comment on the historical events and their meaning from a gender perspective. This research was complemented by filmed interviews on memories of that period and commentaries on Malta's brand of feminism. During the second phase the interviews and information gathered during the first phase were edited into a short film that was shown and is still available to the public.

The result is a documentary product that can be used freely in classes with adolescents as well as undergraduate students. In certain settings it may also be used with other adults and professionals. The product may be accessed through: https://vimeo.com/383476123.

The interesting part of this study is the very same objective, that is an opportunity for the community to reflect on recent history which remains largely unexplored, to take stock of it and to make it their own. Collective memory was tapped into to elicit popular perceptions of gender stereotypes, their evolution, and their impact on contemporary Maltese society. This study is a form of **evaluation**. It can also be used for **awareness** purposes too.

- **Source**: Aditus Foundation website,
https://aditus.org.mt/our-work/projects/burning-bikinis/

Study 8. **Diversity, equity and inclusion in European higher education institutions: results from the INVITED project** research was published in 2019. It was carried out by the European University Association (EUA). This association is the representative organisation of universities and national rectors' conferences in 48 European countries.

The INVITED project, conducted between 2018 and 2019, aimed to support universities in developing strategies towards equity, diversity, and inclusion. It also sought to promote dialogue between stakeholders at the system level in order to ensure that regulatory and funding frameworks empower universities to fulfil their social responsibility. EUA has conducted this research to build a knowledge base on institutional approaches, success factors and challenges as well as the support needs of higher education institutions. EUA, in partnership with the European University Continuing

Education Network and supported by the European Students' Union, led the INVITED project and collected responses from 159 higher education institutions spread over 36 European countries.
The survey was sent out to all the members of EUA. The main tool used was the INVITED questionnaire. Semi-structured follow-up interviews were conducted with 12 higher education institutions from 11 countries. Link to survey: https://www.eua.eu/images/site1/team/INVITED_survey.pdf

The report presents a broad picture with data from 159 higher education institutions in 36 European systems. It shows different institutional strategies and measures and analyses success factors, challenges and needs for support to build institutional capacity. It is of interest to university leaders and managers developing their institutional strategy, staff charged with implementation, researchers and students interested in the topic, as well as policy makers and administrators at European and national levels as they develop new policies for higher education and research. This report is both a diagnosis and evaluation.

•   **Source**:   https://www.eua.eu/resources/publications/890:diversity,-equity-and-inclusion-in-european-higher-education-institutions-results-from-the-invited-project.html

Study 9. Dari? Refugee Voices on Making Malta Home is a research project carried out by three local NGOs between January 2015 and December 2016 in Malta. Dari? (Dari is a Maltese word meaning my home) presents data from around 80 visits conducted by Jesuit Refugee Service (JRS) Malta, aditus foundation, Integra Foundation and UNHCR Malta to refugee homes in 2015 and 2016. Part of a broader project (Project Integrated) supporting refugee integration, these home visits sought to talk to refugees about their integration experiences in Malta. The interviews covered recently arrived refugees, as well as refugees who have been living in Malta for several years. Only refugees who left the open centres to live in private accommodation were interviewed.
The research only includes persons benefiting from either international or national protection. For ethical reasons, persons who were already receiving in-depth social work support from JRS Malta were excluded from the home visits research since it was felt that this might interfere with the social work care-plan designed and implemented by the responsible social worker.

All potential participants were identified from refugees visiting or benefitting from the services offered by the three partner NGOs JRS Malta, aditus foundation and Integra Foundation, as well as by UNHCR Malta. This means that all had existing experiences and relationships as service-users with one or more of the collaborating organisations. All potential candidates were listed in a database and contacted directly, usually by phone, by a representative of one of the organisations or an interpreter where required. During this contact, candidates were given information about Project Integrated and about the home visits research. They were then invited to participate and – where a positive response was elicited – appointments for the home visits were set. Some refugees declined to participate, whilst some refugees were not contactable.

Data collection was done by direct engagement with refugees through the use of a questionnaire composed of thematically gathered guiding questions. Being a semi-structured interview, it was not mandatory for refugees to reply to all queries, and interviewers were invited to adapt questions and flow according to the specific interview context and setting. This informal and open approach also provided space for the research participants to reflect and elaborate on issues considered important to them, rather than on the preconceived ideas and priorities of the researchers.

The data reveals a refugee community that is heavily reliant, and at times dependent, on its own resources to support its members' integration efforts. A primary source of valuable information on life in Malta, co-ethnic communities also hold a monopoly over social networks and activities, job-hunting, and support structures. The data also reveals a sense of discomfort at this relationship on the part of many refugees, commenting on how it has the potential of fuelling insecurity, lack of privacy, and cultural homogeneity.

Although many refugees commented positively on the working conditions they experienced regularly: different treatment for equal work, bullying and harassment, unsatisfying jobs, lack of improvement potential/opportunity, job seasonality, and refusal of employers to register employment.

Concerns were also expressed at the quality of living conditions. Many of the respondents share their living spaces with several other refugees, with some households having over five persons in a relatively small space. Furthermore, our data reveals an extremely high level of accommodation mobility amongst refugees. These elements indicate difficulties they face in securing a home that meets their needs of stability, sustainability, and peace of mind.

The research indicates a relatively low level of interaction between refugees and Maltese people. Beyond day-to-day interactions at work and whilst shopping for groceries, engagement with Maltese people and – importantly – Maltese social and cultural life is extremely limited. Although many refugees attend the village festa, indicating the establishment of roots at an extremely local level, very few participate in other events and activities, citing limited financial means and lack of information about such events.

The research highlights the multiple facets of isolation. As a result of lack of inclusion, co-ethnic communities develop practices that add to the oppression and the general feeling of isolation. The recommendations to the government are very practical and rooted in the findings of the study. This study is a form of an evaluation.

- **Source**: https://aditus.org.mt/Publications/dari.pdf

Study 10. **Research-based Assessment of the National Education Policy on Trans, Gender Variant and Intersex Children** is an inter-agency project implemented throughout 2015 in Malta. The research was intended to conduct a qualitative research exercise assessing the immediate impact on schools of the 2015 policy. The project was run by the Malta LGBTIQ Rights Movement (MGRM), aditus foundation, the Ministry for Social Dialogue, Consumer Affairs and Civil Liberties (MSDC) and the Ministry for Education and Employment (MEDE).

Interviews were held with officials from Public and Church schools, MEDE and trans individuals. All conversations were guaranteed anonymity and with prior authorisation for such research from the Research and Development Department within MEDE. The samples were mostly identified by MGRM through their contacts with a number of schools and gender-variant students. A Policy Assessment Tool used in various qualitative interviews with relevant stakeholders including trans, gender-variant and intersex children and youth; elements within the School Community and officials from MEDE.

Despite the general welcoming of the policy, feedback from all the stakeholder and individual meetings expressed concern about its actual implementation at school level. These concerns include frequent instances of LGTBIQ-related bullying, attitudes of educators and parents, and lack of professional capacity. All interviewees reiterated the need for the policy to reach the broader community for it to be truly effective within the school

environment, underlining the school's role in acting as social educator. The practical recommendations try to strengthen the policy and its implementation are of particular interest in this study. This research is an evaluation.

- **Source**: https://aditus.org.mt/Publications/transgendervariantintersexre port_29022016.pdf

CONCLUSION

Embracing diversity and promoting gender equality within both the workplace and the study place is not only a moral imperative but also a strategic advantage for organisations and educational institutions. By recognizing the value of diversity and fostering an inclusive environment, employers and institutions can unlock numerous benefits, including access to new perspectives, increased innovation, better performance, higher student satisfaction, and reduced attrition rates. However, achieving gender equality requires a comprehensive approach that considers intersecting identities such as race, ethnicity, disability, age, and belief characteristics. To formulate a robust Gender Equality Plan that incorporates mainstreaming and intersectionality in both the workplace and the study place, the following practical suggestions can be considered:

1. Conduct an Intersectional Analysis: Start by conducting a thorough analysis of your organisation or educational institution to understand the unique challenges faced by individuals who belong to multiple marginalised groups. This analysis should examine the intersecting dimensions of gender, race, ethnicity, disability, age, and belief characteristics. It will help identify specific barriers and inequalities that need to be addressed in both the workplace and the study place.

2. Develop Inclusive Policies and Practices: Design policies and practices that prioritise diversity and inclusivity in both the workplace and the study place. Consider implementing measures such as inclusive recruitment and admissions processes, diverse representation in leadership positions, curriculum diversity, inclusive teaching methods, flexible study arrangements, and accommodation for students or employees with disabilities. Ensure that these policies and practices explicitly address the intersecting identities of individuals to promote equal opportunities for all.

3. Provide Intersectional Training: Offer training programmes that educate employees, educators, and students about the concept of intersectionality and its importance in creating an inclusive environment. These training sessions should promote awareness of biases, stereotypes, and discriminatory practices that can affect individuals with intersecting identities. Provide practical tools and strategies for mitigating these biases and fostering a culture of inclusion in both the workplace and the study place.

4. Establish Support Networks and Student/Employee Resource Groups: Create support networks and student/employee resource groups that cater to the specific needs of individuals with intersecting identities in both the workplace and the study place. These groups can provide a safe space for students and employees to connect, share experiences, and support one another. They can also serve as valuable platforms for raising awareness, advocating for change, and influencing organisational or institutional policies.

5. Review and Adapt Organisational or Institutional Practices: Regularly review and evaluate organisational or institutional practices, policies, and procedures to ensure they align with the principles of gender equality, diversity, and intersectionality. Identify areas that may inadvertently perpetuate inequalities and make necessary adjustments to promote inclusivity. This could include revising curriculum content to reflect diverse perspectives, addressing biases in grading or performance evaluations, and implementing mentorship and sponsorship programmes for students or employees with intersecting identities.

6. Engage in Partnerships and Collaborations: Collaborate with external organisations, academic institutions, and community groups that specialise in diversity, intersectionality, and gender equality. Engaging in partnerships can provide access to valuable expertise, resources, and best practices that can strengthen the Gender Equality Plan and ensure its effectiveness in both the workplace and the study place.

7. Communicate and Monitor Progress: Communicate the organisation's or institution's commitment to gender equality, diversity, and intersectionality by regularly sharing progress, achievements, and challenges with employees, students, stakeholders, and the wider public. Report in a transparent manner on key indicators, such as representation and retention rates of individuals

with intersecting identities, to demonstrate accountability and encourage continuous improvement in both the workplace and the study place.

By incorporating these practical suggestions into a Gender Equality Plan, organisations and educational institutions can effectively mainstream diversity and intersectionality. This approach will ensure that gender equality efforts extend beyond a singular focus on gender and actively address the unique experiences and challenges faced by individuals with intersecting identities in both the workplace and the study place. By fostering inclusive and equitable environments that value and support all employees and students, organisations and educational institutions can thrive, attract diverse talent, drive innovation, and contribute to a more just and inclusive society.

REFERENCES

• Anil, M., 2022a, Importance of Diversity in the Workplace & Ways of Improving it [HR Shelf], [Online]. Available: https://hrshelf.com/importance-of-diversity-in-the-workplace/ [June, 12 2023].

• Anil, M., 2022b, *What is Workforce Diversity - Types, Benefits & Challenge* [HR Shelf], [Online]. Available: https://hrshelf.com/workforce-diversity/ [June, 09 2023].

• Bertrand, M. e Hallock, K.F. (2001). *The gender gap in top corporate jobs*. Industrial and Labor Relations Review, 55(1), 3-21.

• Biography.com Editors. (2022-last updated), Marsha P. Johnson, [Biography], [Online]. Available:
https://www.biography.com/activist/marsha-p-johnson [April 13, 2023]

• Blau, F. D., & Kahn, L.M. (2017). *The gender wage gap: Extent, trends, and explanations*. Journal of Economic Literature, 55(3), 789-865.

• Cornish, M. (2013). *10 Ways to Close Ontario's Gender Pay Gap*, [Canadian Center for Policy Alternatives], [Online]. Available:
https://policyalternatives.ca/sites/default/files/uploads/publications/Ontario%20Office/2013/0 4/10Ways_to_close_ON_Gender_paygap.pdf [June 19, 2023]

• Corporate Planning and Policy Division NSERC, 2017, Women in Science and Engineering in Canada [Natural Sciences and Engineering Research Council of Canada], [Online]. Available:

https://www.nserc-crsng.gc.ca/_doc/Reports-Rapports/WISE2017_e.pdf
[April 14, 2023]

• Crenshaw, K. (1989). *Demarginalizing the intersection of race and sex: A Black feminist critique of antidiscrimination doctrine, feminist theory and antiracist politics*. University of Chicago Legal Forum, 139-167.

• Cutajar, J. (2021). *The imbrication of gender and nationality where the pay gap is concerned: the case in Malta*. In A. Ssjostedt, K. Giritli-Nygren & M. Fotaki (Eds.), *Working Life and Gender Inequality: Intersectional Perspectives and the Spatial Practice of Peripheralization* (pp. 135-155). Routledge, Taylor & Francis Group.

• Dixon-Fyle, S., Dolan, K., Hunt, V. and Prince, S., (2020). *Diversity Wins: How Inclusion Matters*, [McKinsey & Company], [Online]. Available: https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters [April 13, 2023]

• England, P. (2010). *The gender revolution: Uneven and stalled*. Gender & society, 24(2), 149-166.

• Garrison, S., 2018. *On the limits of "trans enough": Authenticating trans identity narratives*. Gender & society, 32(5), pp. 613-637.

• Gascoigne, A., Griffiths, S., Kubalcikova, P., Shenai, G. and Wright, C., 2022, *Repairing the broken rung on the career ladder for women in technical roles* [McKinsey & Company], [Online]. Available: https://www.mckinsey.com/industries/technology-media-and-telecommunications/our-insights/repairing-the-broken-rung-on-the-career-ladder-for-women-in-technical-roles#/ [June 12, 2023]

• Glassdoor, 2019, Diversity & Inclusion Study 2019 [Glassdoor Economic Research], [Online]. Available: https://www.glassdoor.com/about-us/app/uploads/sites/2/2019/10/Glassdoor-Diversity-Survey-Supplement-1.pdf [June 12, 2023]

• Goldin, C. (2014). *A grand gender convergence: Its last chapter*. American Economic Review, 104(4), 1091-1119.

• Greer, T.W. e Carden, L.L. (2021). *Exploring the gender wage gap among project managers: A multi-national analysis of human capital and national policies*. International Journal of Project Management, 39(1), 21–31.

• He, J. and Kaplan, S., 2017. *The debate about quotas* [Gender and the Economy], [Online]. Available: https://www.gendereconomy.org/the-debate-about-quotas/ [June 09, 2023]

• Hunt, V., Layton, D. and Prince, S., 2015. *Diversity Matters* [McKinsey & Company], [Online]. Available:
https://www.mckinsey.com/~/media/mckinsey/business%20functions/people%20and%20organizational%20performance/our%20insights/why%20diversity%20matters/diversity%20matters.pdf [June 12, 2023]

• Johns, M. (2013). *Breaking the Glass Ceiling: Structural, Cultural, and Organisational Barriers Preventing Women from Achieving Senior and Executive Positions* [AHIMA], [Online]. Available:
https://bok.ahima.org/doc?oid=301230 [April 14, 2023]

• Laverne Cox's official website, [Online]. Available:
https://lavernecox.com/ [April 13, 2023]

• Lebuhn, E., 2015. Biography of May Ayim [Ohio State University], [Online]. Available: https://u.osu.edu/berlin2798mayayim/2015/05/17/biography/ [June, 19 2023].

• Lee, S., 2020. *Benefits of diversity in the workplace* [Culture Amp], [Online]. Available: https://www.cultureamp.com/blog/benefits-diversity-in-workplace [June 09, 2023].

• Milem, J. F. (2002). *The Educational Benefits of Diversity: Evidence from Multiple Sectors* [ResearchGate], [Online]. Available:
https://www.researchgate.net/publication/238506813_The_Educational_Benefits_of_Diversit y_Evidence_from_Multiple_Sectors [July 14, 2023]

• Morelli, C. J. e Seaman, P. T. (2016). *The Living Wage: An Economic Geography Based Explanation for a Policy for Equality*. Social Policy and Society. Cambridge University Press, 15(4), 589–605.
Doi:10.1017/S1474746415000482.

• New York Times. (2021, June 24). Marsha P. Johnson, a Transgender Pioneer and Activist, Gets Her Own Monument
(https://www.nytimes.com/2021/06/24/nyregion/marsha-p-johnson-monument.html)

• Noland, M., Moran, T. H. e Kotschwar, B. (2016). *Is gender diversity profitable? Evidence from a global survey*. Peterson Institute for International Economics, Working Paper No. 16-3.

• NATIONAL PUBLIC RADIO. (2015, October 5). Grace Lee Boggs, Detroit Activist and Philosopher, Dies At 100, [Online]. Available: https://www.npr.org/2015/10/05/446528909/grace-lee-boggs-detroit-activist-and-philosopher-dies-at-100 [April 13, 2023]

• Oelez, M., Olney, S. and Tomei, M. (2013). *Equal Pay: An Introductory Guide* [International Labour Organisation], [Online]. Available: https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_216695.pdf [June 19, 2023]

• Ogunniyi, O.R., Alatise, M.A. and Abiodun, O.F. (2019). *Gender inequality and female accountants' career progression in Nigeria*, Gender & Behaviour, 17(4), 14068–14081.

• Plasman, R. and Salimata Sissoko N. (2005). *Comparing apples with oranges: revisiting the gender wage gap in an international perspective*, IDEAS Working Paper Series from RePEc.

• Powell, A., Bagilhole, B. & Dainty, A. (2009). *How women engineers do and undo gender: Consequences for gender equity*. Gender, Work & Organization, 16(4), 411-428.

• Redmond, P. and Mcguinness, S. (2019). *The Gender Wage Gap in Europe: Job Preferences, Gender Convergence and Distributional Effects*, Oxford bulletin of economics and statistics, 81(3), 564–587.

• Riegle-Crumb, C. & Humphries, M. (2012). *Exploring bias in maths teachers' perceptions of students' ability by gender and race/ethnicity*. Gender & Society, 26(2), 290-322.

• Salem, S. (2014). *Decolonial Intersectionality and a Transnational Feminist Movement fighting for decolonial, intersectional feminism in the academy*. Feminist Wire, [Online]. Available: https://thefeministwire.com/2014/04/decolonial-intersectionality/ [April 13, 2023]

• Shreeves, R. and Boland, N., 2021, *Women in politics in the EU* [European Parliament] [Online]. Available: https://www.europarl.europa.eu/RegData/etudes/BRIE/2021/689345/EPRS_BRI(2021)68934 5_EN.pdf [June, 09 2023].

• Stuart Wells, A., Fox, L. and Cordova-Cobo, D., 2016, *How Racially Diverse Schools and Classrooms Can Benefit All Students* [The Century Foundation]

[Online]. Available:
https://tcf.org/content/report/how-racially-diverse-schools-and-classrooms-can-benefit-all-students/ [September, 19 2023].

• The Guardian: Ageism is a sexist issue – and the workplace urgently needs to address it, [Online]. Available:
https://www.theguardian.com/commentisfree/2020/feb/25/ageism-sexist-issue-workplace-older-women-employers [April 13, 2023]

• The Guardian: French ban on Muslim headscarves violates religious freedom, UN says, [Online]. Available:
https://www.theguardian.com/world/2021/mar/02/french-ban-on-muslim-headscarves-violates-religious-freedom-un-says [April 13, 2023]

• The New Yorker: Grace Lee Boggs and the Next American Revolution, [Online]. Available:
https://www.newyorker.com/magazine/2015/06/29/we-are-the-leaders-weve-been-waiting-for [April 13, 2023]

• Time: Laverne Cox son the Intersection of Transgender Identity and Race, [Online]. Available: https://time.com/3626634/laverne-cox-interview/ [April 13, 2023]

• United Nations Women, Global Norms and Standards: Economic Empowerment [Online]. Available:
https://www.unwomen.org/en/what-we-do/economic-empowerment/global-norms-and-standards [April 13, 2023]

• World Economic Forum, The Future of Jobs Report 2023, [Online]. Available: https://www3.weforum.org/docs/WEF_Future_of_Jobs_2023.pdf [April 13, 2023]

• Zhao, D., 2019, *Increasing investment in Diversity & Inclusion: Evidence from the growing job market* [Glassdoor Economic Research], [Online]. Available: https://www.glassdoor.com/research/diversity-inclusion-jobs/ [June 12, 2023]