



STRATEGIC PLAN FOR MAINSTREAMING GENDER INTO MULTIPLE DISCRIMINATION RESEARCH

BERICAT, EDUARDO (Coord.)
University of Seville

BERICAT, EDUARDO (Part I)
University of Seville

CAMARERO, MERCEDES (Part II)
Universidad Pablo de Olavide

JIMÉNEZ, MARÍA LUISA (Part III and IV)
University of Seville



The project is co - funded (80%) by the Rights, Equality and Citizenship (REC) Programme of the European Union

STRATEGIC PLAN FOR MAINSTREAMING GENDER INTO MULTIPLE DISCRIMINATION RESEARCH

María Luisa Jiménez

Introduction.....	3
2. Recommendations for integrating gendered/intersectional approach into research.	4
2.1. Research ideas phase.....	4
2.1.1. Research priorities	4
2.1.2. Theoretical framework.....	5
2.1.3. Literature review	6
2.1.4. Research questions	6
2.1.5. Objectives.....	9
2.2. Research design	10
2.2.1. Methods	10
2.2.2. Variables and categories	12
2.2.3. Research tools	12
2.2.4. Participants.....	13
2.2.5. Ethic aspects.....	15
2.3. Project implementation	15
2.3.1. Equality indicators.....	15
2.3.2. Fieldwork.....	17
2.4. Data analysis and interpretation	18
2.4.1. Examining differences between groups.....	18
2.4.2. Understanding gender and social inequalities.....	19
2.5. Dissemination of findings and knowledge transference	19
2.5.1. Reporting the findings.....	19
2.5.2. Communicating research findings: Ways of dissemination.....	21
2.5.3. Implementing research findings	22
2.6. Evaluation	23
References.....	24

Web resources	28
Annexes	29
Annexe 1. Gender / intersectional academic databases	29
Annexe 2. Checklists for integrating gender perspective into research.....	30
CHECKLIST FOR GENDER IN RESEARCH (European Commission 2011b)	30
CHECKLIST FOR APPLYING GENDER-SENSITIVE APPROACH IN RESEARCH (Trbovc and Hofman 2015).....	31
CHECKLIST FOR GENDER SENSITIVE RESEARCH (Leduc 2009)	32
CHECKLIST (GENDER-NET 2016).....	33
SAMPLE EVALUATION QUESTIONS ON GENDER EQUALITY (Asian Development Bank 2013).....	34

Introduction

This chapter presents a set of recommendations to integrate the issues on gender equality into the 'mainstream' of project activities. The aim of this plan is to ensure that the analysis of multiple discrimination will be informed by a consideration of gender differences and inequalities.

This selection of recommendations is the result of a literature review on gender, intersectional mainstreaming and research. In many of the sections, gender mainstreaming is taken as a guide and gateway to consider other grounds of inequality and discrimination. According to the European Commission (2011a), "the gender mainstreaming infrastructure can be of assistance in developing non-discrimination/equality mainstreaming. It is possible to:

- Expand the remit of the gender mainstreaming infrastructure to develop an integrated mainstreaming approach such that one infrastructure covers all the grounds of gender, racial or ethnic origin, disability, religion or belief, age and sexual orientation.
- Use the gender mainstreaming approach as the model to develop a similar mainstreaming infrastructure for other individual grounds or for an integrated approach that covers all the grounds of sexual orientation, racial or ethnic origin, age, religion or belief and disability.
- Use the gender mainstreaming approach as the standard and adapt some of the structures, tools and supports for use in non-discrimination/equality mainstreaming" (European Commission, 2011a).

These recommendations are structured in accordance with the main stages of the research circle:

1. Research ideas
2. Research design
3. Implementation project
4. Data analysis and interpretation
5. Dissemination of findings and knowledge transference
6. Evaluation

2. Recommendations for integrating gendered/intersectional approach into research

2.1. Research ideas phase

“A major area for attention in the gender mainstreaming strategy is the definition of specific research projects. This includes consideration of the purpose and scope of the project, and whether these can be formulated to reflect the perspectives and priorities of women as well as men on the issue under investigation” (United Nations, 2002: 16).

2.1.1. Research priorities

“The incorporation of gender and intersectional lens into research involves rethinking focus, priorities and outcomes” (Expert Group “Innovation through Gender”, 2013: 105). Several issues should be addressed and made explicit in this decision process:

- **What problems and needs** will take part in the research? From a gender/intersectional approach, it is important to attend to emergent problems and needs of women and vulnerable groups as well as reformulate “classic” problems and needs (traditionally raised from an androcentric/sexist view) (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 68).
- **“Whom will the research benefit**, and whom will it leave out? Will the research have differential effects on women and men, or on particular groups of women and men?” (Expert Group “Innovation through Gender”, 2013: 105).

From a gender approach, we need to think:

- “How do gender norms influence priorities? What concerns about sex and gender have guided the priorities chosen, and how might they shape or limit the agenda? (Expert Group “Innovation through Gender”, 2013: 105).

Additionally, from an intersectional approach, several choices must be made:

- **“Deciding which intersections of identities to use.** One difficulty researchers encounter when incorporating an intersectionality perspective is that the act of expanding the research scope to include multiple dimensions of social identity makes analysis more complex. [...] As a researcher, however, the question remains as to how one should go about determining which identities to use. It goes without saying that researchers cannot be expected, in all circumstances, to include all potentially relevant identities in a research project. [...] In other words, researchers should be able to explicitly state *why* we choose particular intersections rather than simply *that* we do” (Warner, 2008: 455). “When decisions about which intersections to include are not carefully considered, problems ensue:
 - Intersectional invisibility: “people with multiple subordinate identities (e.g., African-American woman) do not usually fit the prototypes of their

respective subordinate groups (e.g., African-Americans, women)” (Purdie-Vaughns and Eibach, 2008: 378) are made invisible.

- Determining who serves as the comparison group. In other words, questions arise over whose experience is the norm to which other individuals are compared” (Warner, 2008: 456).
- **“Questioning whether all intersectional identities or social positions are of equal value, or of sufficient value to merit study”** (Bauer, 2014: 12). In relation to this, it is needed “to make sense” to consider an overall or “master” category (such as gender, ethnicity or social class) versus considering emergent categories” (Warner, 2008: 457)
- **“Considering intersecting identities, positions, processes, or policies.** Careful distinction between intersecting identities or positions (e.g. ethnoracial group, sexual orientation), processes (e.g. racism, homophobia), policies and practices, as well as the methods that are needed to analyse each, has the potential to advance equity in multiple ways. It averts the problem of conflating identity with position or experience, opens up possibilities in studying interactions across these different domains or for examining mediation models, and allows for attention to the differing methodological needs and requirements of different types of intersectional questions” (Bauer, 2014: 13).

2.1.2. Theoretical framework

- **Rethink concepts and theories** from a gender/intersectional approach.
- **“Include explicit definitions of sex and gender** as they relate to aspects of the research study in question and clearly outline the relevance to your research topic” (GENDER-NET, 2016: 42).
- **“Use inclusive definitions of concepts;** avoid male bias, prejudices and generalisations. If men and women have different experiences related to the field of research, it is likely that they have different definitions of concepts. It is important not to generalise the concepts to the ‘overall population’ if the issue concerns only men or if only men’s perspectives have been documented” (Leduc, 2009: 2).
- **“Take into account gender differences in the conceptual and analytical framework.** It is also important to recognise the diversity of women’s and men’s experiences: do not judge who is a ‘real’ woman and who is most representative of men’s role according to your own values” (Leduc, 2009: 2).
- **“Hypotheses, analytical frameworks, and models must be based on reality,** not on assumptions about gender roles, capacities, and cultural values. Double standards, and overrating or underrating activities related to men or women must be avoided” (Leduc, 2009: 2).

- Similar considerations can be applied to **others grounds of discrimination and inequality** such as racial or ethnic origin, disability, religion or belief, age or sexual orientation.

2.1.3. Literature review

- “Include a **systematic analysis and assessment of the state of knowledge** about sex/gender and highlight how these findings could apply to your research topic” (GENDER-NET, 2016: 43).
- **Focus the literature search on issues related to gender and intersectionality.**
There are several ways:
 - Use keywords sensitive to gender and intersectional discrimination and inequality.
 - Search documentation in specific gender/intersectional research databases (annexe 1).
 - In addition to academic information, expand the scope of search to other sources of information (e.g. web, databases and collections of NGOs, equity and non-discrimination institutions, etc.). “Much community-based research is not published in any kind of journal. A good place to start is doing an internet search for research that community organisations might have posted on their website” (Morris and Bunjun, 2007: 30).
- “Ensure that the literature review cites prior **studies that highlight significant similarities and/or differences between men and women** (or female/male animals, tissues and cells) and apply these findings to the research design in question” (GENDER-NET 2016: 42).
- Evaluate and expose the existence of **sexist and androcentric bias** in the field of research (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 70).

2.1.4. Research questions

- “**Ensure gender sensitive formulation of the research question:** The formulation of the research question should integrate a gender perspective: i.e., how are men and women currently affected by the issue and how are they involved in the issue?” (Leduc, 2009: 2).

Critical questions for analysing the significance (if any) of sex and gender in formulating research questions:

1. What is the current state of knowledge of sex and gender (norms, identities, or relations) in a given area of research or development?
2. What do we not know as a result of not analysing sex and gender?
3. How have sex and gender functioned to limit the research questions posed in this field?

Have assumptions been made about sex and gender? Are these justified in light of available evidence? Are assumptions underpinning the research questions invalid when subjected to critical analysis?

- 5. Have any potentially relevant groups of research subjects been left out?
 - 6. What research questions would lead to more robust research designs and methods?
- (Expert Group “Innovation through Gender”, 2013: 110)

- **Formulate research questions that express needs, interests and priorities of both males and females** (UNESCO, 2015: 83). “Ask questions about the responsibilities, activities, interests and priorities of women and men, and how their experience of problems may differ. Consider possible differences and inequalities between women and men and how they could be relevant to the issue” (United Nations, 2002: 3).

Key issues to explore gender differences and inequalities

“Gender is an issue because of the fundamental differences and inequalities between women and men. These differences and inequalities may manifest themselves in different ways in specific countries or sectors, but there are some broad patterns that point to questions that should always be considered. The elements below could be taken as starting points to explore how and why gender differences and inequalities are relevant in a specific situation:

- Inequalities in political power (access to decision-making, representation, etc.)
- Inequalities within households
- Differences in legal status and entitlements
- Gender division of labour within the economy
- Inequalities in the domestic/unpaid sector
- Violence against women
- Discriminatory attitudes”

(United Nations, 2002: 6-7)

- “Draw attention on how to **detect gender stereotypes, inequalities, and gender biases**” (Trbovc and Hofman, 2015: 7).
- **“Take account of diversity:** Differences in the identity, experience and situation of people within the target group could be addressed” (European Commission, 2011a: 13).

Avoid assuming that all women or all men share the same needs and perspectives. There are differences among women and among men that relate to class, religion, age, ethnicity and other factors. Women and men are not homogenous groups. It is important not to generalise across diverse populations, but rather to consider the ways that needs and perspectives of individuals are influenced by a range of factors, including gender (United Nations, 2002: 3).

Conduct research that will focus on the complexities of sex and gender to underline the intersections of ethnicity, socioeconomic class and sexuality, gender roles and the cumulative effects of gendered lives (The CIHR Institute of Gender and Health, 2004: 15).

- Consider **needs, interests and priorities of vulnerable intersecting groups** (e.g. lesbians, aboriginal women, women with disabilities, low-income women, women

members of ethnic, racial and linguistic minorities, young and senior women (Morris, 1999: 11).

Key issues to analyse intersecting discriminations

“When setting priorities for projects, allocate resources to those who are most marginalised as revealed by analysing intersecting discriminations. Empowering those who have the least access to rights and resources and focusing on processes that lead to poverty and exclusion (e.g. by providing basic medical services and educational opportunities, protecting their livelihood security, or supplying appropriate agricultural technologies and inputs) may affect the greatest tangible advances in terms of women’s rights and gender equality. To do this, start and carry on your work by asking these key questions:

- What forms of identity are critical organising principles for this community/region (beyond gender, consider race, ethnicity, religion, citizenship, age, caste, ability)?
- Who are the most marginalised women, girls, men and boys in the community and why?
- What social and economic programs are available to different groups in the community?
- Who does and does not have access or control over productive resources and why?
- Which groups have the lowest and the highest levels of public representation and why?
- What laws, policies and organisational practices limit opportunities of different groups?
- What opportunities facilitate the advancement of different groups?
- What initiatives would address the needs of the most marginalised or discriminated groups in society?”

(Women’s Rights and Economic Change, 2004: 7)

- Situate the questions of research within the **context of historical and socio-political power relations** (The CIHR Institute of Gender and Health, 2004: 15).
- “Ensure that attention to these issues does **not contribute to pathologisation** of any group. Paradoxes arise when attending to marginalised voices in that people may become vulnerable to dangerous labelling and stereotyping” (The CIHR Institute of Gender and Health, 2004: 15). In this sense, **avoid blaming and victimising** vulnerable women and multi-discriminated groups (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 69).
- **“Consultation of groups experiencing inequality.** This consultation provides information and knowledge that enhances the quality of research. Non-governmental organisations provide the key channels for this consultation. This consultation can be in the form of a pre- hearing at the starting point of developing a new research” (Crowley, 2009: 9).
- **“Acknowledge our own bias.** Scientific research is not neutral. The position of the researcher, their interests, and values affect how and what research topics are chosen, who they work with, and the perspective and method of research. Even the researcher’s position in society (in terms of gender, class, ethnicity, and age) may influence the way in which the research is conducted, how the information is analysed, and how the results are interpreted” (Leduc, 2009: 2).
“Researchers need to question their standpoint, which may be influenced by their gender, race, class, religion and ethnicity” (UNESCO, 2015: 85).

2.1.5. Objectives

From a gender mainstreaming view, it is important to distinguish between practical gender needs and strategic gender interests (Moser, 1993).

Practical gender needs and strategic gender interests

- **Practical gender needs** are the needs women identify in their socially accepted roles in society. Practical gender needs do not challenge the gender divisions of labour or women's subordinate position in society, although rising out of them. Practical gender needs are a response to immediate perceived necessity, identified within a specific context. They are practical in nature and are often concerned with inadequacies in living conditions such as water provision, health care, and employment.
- **Strategic gender needs** are the needs women identify because of their subordinate position to men in their society. Strategic gender needs vary according to particular contexts. They relate to gender divisions of labour, power and control and may include such issues as legal rights, domestic violence, equal wages and women's control over their bodies. Meeting strategic gender needs helps women to achieve greater equality. It also changes existing roles and therefore challenges women's subordinate position.

(Moser, 1993: 39-40).

In the research field, this classification can be applied to the formulation of objectives. Then, we can identify:

- **Practice equality/non-discrimination objectives**, in relation to the knowledge aims of study (substantives objectives). These aims must be able to generate data on how and why gender and social differences and inequalities are relevant to the multiple discrimination phenomenon.
- **Strategic equality/non-discrimination objectives**, in relation to promote empowerment of vulnerable groups and social change towards equity and equality (Crowley, 2009). This means that the research should contribute to:
 - "Eliminate barriers for groups experiencing inequality. These barriers could lie in: the design and implementation of the policy, the situation and experience of people from these groups, the values held by people from these groups (European Commission, 2011a: 13).
 - Advance equality for groups experiencing inequality. This would be in terms of enhancing their access to resources, power and influence, status, and relationships of care and solidarity (European Commission, 2011a: 13).
 - Foster good relations between the wider society and groups experiencing inequality" (European Commission, 2011a: 13).

To achieve this, it is important to include into objectives:

- "The **participation of organisations** representing groups experiencing inequality [...] This participation is also a feature in implementing other mainstreaming tools such as equality impact assessment and gathering equality data" (European Commission, 2011a: 19).

- “The **identification of users and beneficiaries** of scientific results in gender/equality sensitive way” (Trbovc and Hofman, 2015: 8).
- The forecast of several **ways of dissemination and transference** of findings aimed to diverse users and beneficiaries of the findings of research. This implies thinking about, in addition to the conventional products of research (articles, books, communications...), other ways of disseminations of results (e.g. factsheets, guide, trainings materials, films, documentaries, web pages, meetings with other agents working on discrimination, etc.).

2.2. Research design

“Gender mainstreaming also requires attention to the methodology proposed and whether it will ensure that gender differences and inequalities are documented and explored” (United Nations, 2002: 16). This can be done by flexible, innovative, multidisciplinary and participative designs that allow capturing dynamics and effects linked to gender (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 74). Questioning the conventional approach to research is important (Leduc, 2009: 3).

2.2.1. Methods

- “**Data collection tools** (such as questionnaires and interview checklists) need to be gender-sensitive, use gender-neutral language, and should make it possible to detect the different realities of men and women. This will help to avoid gender bias. For example, answers to be provided by the ‘head of household’ are not necessarily valid for all household members” (European Commission, 2011, part 2.3).
- “If you are conducting **surveys** in your research, or disseminating questionnaires, design your questions so they are relevant to both women and men” (Trbovc and Hofman, 2015: 34)
- “Use **qualitative tools** to capture people’s perspectives and diversity of viewpoints. If quantitative tools are useful for identifying ‘what’ and ‘how many’, qualitative tools are interesting because they help us to understand ‘how’ and ‘why’. They give a voice to people, even for issues that seem very technical, recognising that both men and women from any socioeconomic background have valuable experiences and knowledge” (Leduc, 2009: 3).

Qualitative methods –ethnography, neighbourhood studies, participatory action research, historical analyses, structured interviews, textual analyses (Hankivsky et al., 2009:28)– have been highlighted for studying the complex construct of intersectionality.

“Qualitative methods provide information about the particular, partial, and emergent nature of meaning. A qualitative methodological approach pays special attention to subjective experience, and how this experience is dependent on one’s social location. Some qualitative methods are particularly helpful for when the

researcher is interested in the complexities of individual identity negotiation. Focus groups, for example, are good for seeing how people create and reinforce meaning and elaboration of identities through interaction. Focus groups are amenable to the notion that meaning is always negotiated between individuals, often through linguistic interactions with others. Because linguistic interactions serve this function, researchers must study real conversations in order to be able to see how meaning is created” (Warner, 2008: 461).

- **Combining multiple methods.** “Statistics alone do not provide reasons or explanations for differences. A system of information gathering to supplement available statistical and qualitative research is necessary in order to obtain a full picture of the current situation. The approach to be adopted should involve a combination of analysis of existing quantitative and qualitative data and research, the identification of gaps in available information and the commission of new research and data collection (Centre for Strategy and Evaluation Services, 2007: 27).

Methodological approaches, such as mixed methods, capitalise on the advantages of both quantitative and qualitative methods. A mixed-methods approach is not the mere collection of qualitative and quantitative methods, but rather a distinct methodology focused on rigorously combining statistical approaches with in-depth culturally grounded narratives and meanings from qualitative approaches to gain a deeper understanding than either method could provide alone” (Bowleg and Bauer, 2016a: 338).

- **“Multilevel models”** can help integrate several levels (individual, household/familiar, neighbourhood/community...) where gender relations take place (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 75).
- Use **participatory and empowering methods** “to ensure that women’s voices are heard and their experiences captured by the researchers” (United Nations, 2002: 16).

“Participation of organisations representing groups experiencing inequality is a tool for the implementation of non-discrimination/equality mainstreaming in its own right. This participation is also a feature in implementing other mainstreaming tools such as equality impact assessment and gathering equality data” (European Commission, 2011a: 19).

“Participatory action research is gathering and analysing information which is conducted for the purpose of social change, usually with a specific action as the goal. The action research process itself may also contribute to social change” (Morris, 1999: 7).

- **“Innovative methodologies and analytical tools** must be devised in order to capture the significance of sex and gender to health research” (The CIHR Institute of Gender and Health, 2004: 16).

Innovating in research methods to capture gender relations and intersectionality

Photovoice is becoming a popular research method to document the daily lives of people with less social, political and economic power. Attributed to Caroline Wang, photovoice was first developed so that women living in the rural Yunnan province in China could take pictures as a form of capturing the hardships they faced in order to influence policy-makers. It has since been used by other researchers and social justice groups to: “enable them [local people] to act as recorders, and potential catalysts for social action and change, in their own communities. It uses the immediacy of the visual image and accompanying stories to furnish evidence and to promote an effective, participatory means of sharing expertise to create healthful public policy”.

(Morris and Bunjun, 2007: 34)

2.2.2. Variables and categories

- Define and use **sex as a central variable** in addition to other such as age, social class or ethnicity (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 78).
- Define and use **variables and categories linked to gender** (e.g. roles, rules, identity processes, resources distribution, power relations, etc.) (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 78).
- Critically assess androcentric and sexist variables (e.g. head of household or traditional measurement of social class) and propose alternative gender-sensitive variables) (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 78).
- “Gather relevant data in relation to the **situation, experience and identity** of groups experiencing inequality” (European Commission, 2011a: 18).

Identify relevant variables and categories to document gender and social inequalities

- “The **SITUATION**: This would include economic resources such as labour market position or educational status, and political resources such as power or influence.
- The **EXPERIENCE** of these groups in terms of their relationships with the wider society and in particular with those responsible for implementing the policy. This data will be more qualitative. It would establish the attitudes and behaviours of the wider society towards the group. It would identify how these are likely to find expression within the organisations that would implement the policy.
- The **IDENTITY** of these groups in terms of the norms and values, beliefs and aspirations they hold. This data will be more qualitative. It would establish the perspective of the group on the policy area. It would identify the potential behaviours of the group in response to the policy proposed”.

(European Commission, 2011a: 18)

2.2.3. Research tools

- **Use gender sensitive research tools.** “It is important to use research’s tools that are not seen as threatening or embarrassing for women or men. It can be very challenging for some women to talk about some issues in front of men from their family or community, or men from the outside. Written materials are not appropriate when working with illiterate people or people with a low-level of

education and can place a barrier between the researchers and the sample population” (Leduc, 2009: 3).

“Even if women and men have different roles and experiences, it is important to give them the opportunity to present their points of view on the same subject and pay attention to the similarities and the differences. Often researchers ask different questions to men and women, assuming that they have different levels of interest in the topic” (Leduc, 2009: 3-4).

- **Examine bias** that can affect the validity and reliability of the tools from a gender/intersectional perspective. Research instruments and methods are imbued with bias because of education, social class, gender and other factors. For example, illiterate women and men may not respond to questionnaires and might resort to asking their children to respond on their behalf. This may generate inaccurate and meaningless results (UNESCO, 2015: 86).
- When we use **questionnaires**, these must:
 - Collect data disaggregated by sex and other variables linked to social stratification age, ethnicity, social class, etc.
 - Cover different aspects of the gender relations and the different contexts in which they take place (e.g. paid and unpaid work).
 - Include questions that measure specific situations and needs of women and men as well as particular intersecting groups.
 - Ensure the questions are relevant and understandable for different groups. (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 81)
- If we use **interviews**, raise specific questions to allow:
 - Rebuilding the context of the gender relations and situations of discrimination.
 - Deepening and understanding particular inequality experiences.
 - Capturing interpretations and perceptions about gender and social inequality (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 81).
- In the case of **participant observation**, do not forget to include contexts that are relevant for women and vulnerable groups. Often these contexts are situated in private, domestic or hidden spheres where it is difficult to access (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 81).

2.2.4. Participants

- “Ensure that the research sample in question is appropriate, and where relevant include proportional representation of men/boys and women/girls to capture sex and gender-based factors, and other important factors intersecting with sex and gender (age, ethnicity, disability, religion, sexual orientation...)” (GENDER-NET, 2016: 43).

“How information is collected and analysed and who is collecting it is important because it influences the quality, authenticity, and value of the information itself. Unless the research is specifically focused on men’s experience, making sure that women are equitably represented in the sample population is essential” (Leduc, 2009: 3).

- “Especially when conducting population polls, ensure you obtain a **proportional gender ratio**. If you organise focus groups, provide equal numbers of men and women in the sample. Interview equally men and women” (Trbovc and Hofman, 2015: 34)
- “Intersectionality researchers committed to social equity must be attentive to **hidden subpopulations** within larger groups. [...] Two methods may be useful: respondent-driven sampling (RDS) and time-space sampling (TSS). Both may be well suited for research with marginalised populations who are not readily accessible using more traditional sampling approaches, such as the random or purposive sampling. RDS attaches recruitment probabilities to a snowball-type sample, and TSS constructs time–space units to reduce sampling bias in venue- or place-based samples [...] Both of these methods may be useful for sampling “hidden” populations, for whom no sampling frame exists, or those who represent proportions that are too small to make random sampling feasible” (Bowleg and Bauer, 2016a: 339).
- The methodology should **differentiate between the sexes and take into account men’s and women’s situations equally**. Groups such as ‘citizens’, ‘patients’, ‘consumers’, ‘victims’ or ‘children’ are therefore too general as categories (European Commission 2011, part 2.3).

“Question assumptions about “families”, “households” or “people” that may be implicit in the way a problem is posed or research is formulated. The importance of making the assumptions about these aggregate terms explicit and assessing whether they are valid has been demonstrated by research in the last two decades. Studies have shown, for example, that “people” respond to economic changes in gender-specific ways because gender is a major influence on their access to resources, responsibilities and alternatives. Research has also shown that resources are not necessarily distributed equitably among household members, nor is there equitable decision-making about the use of these resources. Ignoring these factors may result in misleading analyses of issues or inaccurate assessments of likely policy outcomes” (United Nations, 2002: 3).
- “**Choice of respondents** may also reflect on researcher bias. It is rare for researchers to interview chief executives, ministers of education, headmasters or professors. Instead, researchers tend to focus their research on students, secretaries, technicians and other service staff, a lot of them women” (UNESCO, 2015: 86).

2.2.5. Ethic aspects

From a gender/intersectional approach, there are several core principles that should guide the research:

- **Reflexivity:** Make explicit subjective and reflexive process taken in the research project (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 128).
- **“Sensitivity to the study’s effects on the participants.** Unforeseen consequences may arise when researchers study marginalised groups to whom they do not belong” (Morris, 1999: 5).
- **“Benefiting the participants.** It is easier to identify what concrete benefits individual participants may gain from the research rather than the gains whole communities may make. Research projects can include skills-sharing, information-sharing and the forming of long-term networks with and between participants. Action research in particular can include media relations skills and lobbying skills, so that participants themselves can gain or strengthen their confidence to move the research issue forward. A research project can involve sharing access to resources with participants, such as materials about the research topic” (Morris and Bunjun, 2007: 32).
- **Equality and social justice:** Feminist critiques must be accompanied by a critique of all discriminatory distortions. Feminist ethics require action directed at achieving social justice (Brabeck and Brabeck, 2014).

2.3. Project implementation

2.3.1. Equality indicators

“Given the centrality of data collection, analysis and dissemination, the mainstreaming of gender perspectives in statistics is crucial. Mainstreaming gender perspectives in statistics implies that all statistics are produced taking in consideration gender roles and gender differences and inequalities in society. All data – both those on individuals, as well as those not directly related to individuals – should be collected, compiled and analysed taking in account the gender-based factors that influence women’s and men’s roles, access to resources, and the way women and men benefit from access to resources, facilities and services” (United Nations, 2002: 21).

- **“Sex-disaggregated data** should be used at all times to gain a more informed understanding of an issue or situation and to allow gender differences and inequalities to be identified and addressed” (United Nations, 2002: 3).

“However, disaggregation by itself is inadequate. Sex-disaggregated data are simply data collected and tabulated separately for women and men. Having data by sex does not guarantee that concepts, definitions and methods used in data production are conceived to reflect gender roles and relations in society. It is equally important to consider whether the types of data collected are adequate to

responding to the basic questions which need to be asked about sectors/issues from a gender equality perspective. Gender mainstreaming in statistics can involve collecting **new types of data or expanding data collection** in some areas to fill existing knowledge gaps” (United Nations, 2002: 21-22).

- **Examine intra-group diversity.** “Remember that ‘women’ and ‘men’ are not monolithic groups and that differences in the situations of individuals within these groups might be bigger than those between the groups. Attention to the intersecting inequalities and the influence of other factors (like age, family status, contractual basis, etc.) is thus warranted” (European Institute for Gender Equality, 2016: 49).

In compiling **data sets and statistics** about the impacts of economic policies on women, ask specifically about the experiences of those from different ethnic groups, migrants, poor women, and women of other identified groups (Stoetzler, 2016) (Women’s Rights and Economic Change, 2004: 6).

“For non-discrimination mainstreaming to be effective, it is necessary to measure the extent and impact of discrimination amongst those **social groups identified as being at higher risk of discrimination** and then to monitor this on a regular basis. It is important to establish an evidence base founded upon relevant, reliable and up-to-date quantitative and qualitative data about the situation of social groups experiencing inequality” (Centre for Strategy and Evaluation Services, 2007: 27).

“**Measurement of oppression** involves scales that may combine experiences of oppression within one domain, such as racism or ethnic discrimination or homophobia requiring experiences to be disaggregated by participants and attributed to specific domains of discrimination” (Bauer, 2014b:14).

- **“Gender-sensitive and gender-specific indicators** are key to measuring gender-related changes over time. They can be quantitative (e.g. number of female and male researchers), or qualitative (usually used to capture/assess people’s experiences, opinions, attitudes, behaviours and feelings). While quantitative indicators can provide statistical evidence of what has changed, qualitative analyses allow assessment of the quality of change and aid in understanding why certain patterns have occurred” (European Institute for Gender Equality, 2016: 49).
- **“Equality data** provides a basis to establish equality objectives, to assess the potential impact of a policy on groups experiencing inequality and to track the actual impact of a policy on these groups. Equality data includes data on:
 - the societal context for groups experiencing inequality
 - the participation of and outcomes for these groups in different social areas
 - the difference between these groups and the wider society – difference in their situation, experience and identity, the practice and impact of the policy making organisation in promoting equality” (European Commission, 2011a: 19).

“The availability of equality data can be limited. The data used in mainstreaming will, therefore, need to be both qualitative and quantitative. It should draw from a range of sources – academic research, administrative data gathering by public bodies, and research and survey work of non- governmental organisations. It is also important to recognise that in most circumstances enough data is actually available for the type of decisions that have to be made” (European Commission, 2011a: 19).

- **Identification of gaps:** “A thorough audit of available data should be carried out to identify where there are gaps in existing information, either for particular equality strands or where more detailed data are needed in order to develop a full picture on which to base subsequent impact assessments, equality plans or decisions. Where gaps are identified, the collection of new quantitative or qualitative data might prove necessary” (Centre for Strategy and Evaluation Services, 2007: 28).
- **Adapting procedures for future data collection:** “Collecting data on the target groups affected by equality concerns should not be a ‘one-off ‘exercise but an ongoing procedure. The situation of different groups will change over time. If an organisation intends to adopt mainstreaming principles in all its activities, up-to-date data will be needed for other equality impact assessments at a later stage” (Centre for Strategy and Evaluation Services, 2007: 28).

2.3.2. Fieldwork

- “Ensure that research activities are conducted during **times** when respondents are likely to be free to interact with researchers. Men, women and children may have different work and domestic schedules, so plan research activities with relevant groups at various times during the research process to ensure thorough and gender balanced coverage” (UNESCO, 2015: 85).

“Some **places** or times may be convenient for men, but not for women; this will contribute to the exclusion of women. In some contexts women have very few opportunities to express their ideas; consequently their knowledge and opinions are often neglected, even by themselves. They are not used to talking in public or to being consulted. Thus, it is important to show interest in their roles and views, to value their experiences, and to have patience” (Leduc, 2009: 3).

In order to promote the participation of different groups, it may be necessary to:

- Broaden the time frame and places for collecting data.
 - Provide means of transport, and child and elderly dependent people care services.
 - Use alternative ways of collecting data such as the Internet (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 83).
- **“The researchers’ relationship to the researched.** The usual distant and hierarchical position of researchers has been criticised in recent years, because it often eliminates a wide range of knowledge and raises ethical issues about who is

benefiting from the results of the research, and how and for what purpose the results are used. A gender sensitive methodology not only takes into account gender differences in the conceptual and analytical framework, it also uses methods and tools that are participatory, respectful, and accountable” (Leduc, 2009: 3).

“There are challenges of power and perspective even within participatory action research. In feminist health research, those performing the research may not share the perspective of those being researched, and may not reflect the diversity and concerns of the research participants. Some ways to reduce the impact of this are:

- perform community-based research, which is directed by the community from choosing research topics to design to dissemination of results;
- engage in team research with team members who reflect the diversity of the research population;
- establish research partnerships;
- pilot the research with participants and use their feedback to make the research design more effective” (Morris, 1999: 5).

2.4. Data analysis and interpretation

2.4.1. Examining differences between groups

- **Disaggregate data by sex and gender and intersect data with gender** (Trbovc and Hofman, 2015: 35)

“In most researches concerning human subjects, data are routinely disaggregated by sex, which would logically lead to analyses according to sex. However to date this is still not a common practice. Systematically taking sex as a central variable, and analysing other variables with respect to it (e.g. sex and age, sex and income, sex and mobility, sex and labour) will provide significant and useful insights. Involving gender-balanced end-user groups in the course of the research is also a good way of guaranteeing the highest impact” (European Commission, 2011, part 2.3).

- Examine the intersections of gender with other grounds of discrimination to explore inequalities within and across social groups (Hankivsky, Cormier, de Merich, 2009:6).

Where possible, data should be collected and analysed separately for each of the relevant equality categories as the experiences and needs of each target group are likely to be different (Centre for Strategy and Evaluation Services, 2007: 28).

- Analyse this data on difference – on the situation, experience and identity of the groups experiencing inequality (European Commission, 2011a: 19)

- Use **synthetic measurements of gender inequality** (e.g. gender gaps, indices of feminisation...) to make gender imbalances visible (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 84).
- Analyse data with attention to **within group diversity** (rather than a sole focus on between group comparisons, typically defining a majority group as a normative “control”) (Parent et al., 2013: 643).
- Particular recommendations for how to integrate intersectionality into **quantitative methods and techniques** may be consulted in (Bauer, 2014; Bowleg and Bauer, 2016; Else-Quest and Hyde, 2016; Rouhani, 2014; Scott and Siltanen, 2012; Spierings, 2012).

2.4.2. Understanding gender and social inequalities

- Documenting differences based on gender does not provide comprehension of gender issues, or why there are differences, inequities, or inequalities. A **gender analysis** should explain the differences in experiences, viewpoints, and impacts related to gender roles and power relationships (Leduc, 2009: 4).

Gender analysis

A gender analysis should provide information about how men and women are related to, or affected by, the subject of the research. It should take into account the following factors:

- The division of labour, roles, and responsibilities between men and women: who is doing what and what is the link with the research’s topic; women and men’s access to and control over resources: natural resources, financial resources, information, decision making processes.
- The power relations in the household, community, society, workplace, and so forth.
- The legal and social status of men and women.

(Leduc, 2009: 4)

- The **contextual analysis** is central in the study on gender inequality and multiple discrimination because it helps to understand “that individuals occupy complex and dynamic social locations, where specific identities can be more or less salient depending on the historical or situational context” (Hankivsky et al., 2009: 5).
- Attend to **power relations**. Power as central to both gender and intersectional analysis (Hankivsky, Cormier, and de Merich, 2009; Choo and Ferree, 2010; Bowleg, 2008).

2.5. Dissemination of findings and knowledge transference

2.5.1. Reporting the findings

- **“Highlight the gender dimension.** The reporting process should highlight the gender dimension of the research topic. It should make visible gender differences: different roles, different involvements, different experiences, different opinions,

and different needs. It should also provide as much visibility to women’s contributions and experiences as men’s” (Leduc, 2009: 4).

“Gender perspectives are also important in other reports and publications targeting decision-makers and the public. If these documents fail to highlight the **importance of the goal of gender equality and to incorporate relevant gender perspectives**, an important opportunity is lost. Although many documents now include a separate section on ‘gender issues’, it is much more effective to integrate gender perspectives throughout the entire document, including in both the analysis and the conclusions or policy recommendations. Finally, given the increasing importance of electronic documents and communication, the content of websites could also be examined from a gender perspective” (United Nations, 2002: 23).

- **Recommendations to publishing scientific articles** (Heidari et al., 2016; De Castro, Heidari, and Babor, 2010).
- Ensure a correct and accurate use of the **concepts “sex” and “gender”** (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 124).
- “Use **gender sensitive / inclusive language** in the research report. An effective way to highlight the gender dimension of the research’s topic is to use gender sensitive language. Language itself is not neutral and, in most cultures, has largely been forged by men and, therefore, reflects the values of patriarchal society. Generic terms should be used to translate generic situations and gender specific terms to make visible men’s or women’s roles and perspectives” (Leduc, 2009: 4).

“In most European languages, plural masculine form is often used to refer to both men and women – when referring to unknown individuals, officials’ titles, names of the profession etc. Use of feminine form, or interchanging masculine and feminine ones, makes women more visible in both life and science. Even more, using feminine forms may remind you of the potential gender dimension in your research, which you might have overseen. If part of your project is conducting visual analysis, think how images could reproduce certain stereotypes about gender roles” (Trbovc and Hofman, 2015: 34).

Inclusive language guides

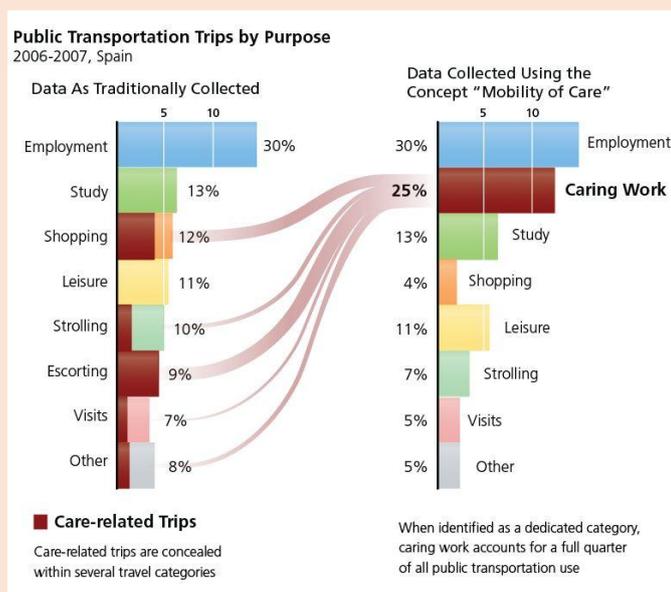
- APA Guidelines for Non-Sexist Use of Language
<http://www.apaonlinecsww.org/apa-guidelines-for-non-sexist-use-of-language>
- Bias-Free Language Guide – University of New Hampshire
<https://www.girardatlarge.com/wp-content/uploads/2015/07/Bias-Free-Language-Guide-Inclusive-Excellence-073015.pdf>
- Inclusive language guide: respecting people of intersex, trans and gender diverse experience
<http://lgbtihealth.org.au/resources/inclusive-language-guide/>
- Inclusive language guidelines – HR Council Canada
<http://hrcouncil.ca/hr-toolkit/diversity-language-guidelines.cfm>

- Pay attention to **unintended hypothesis-creating metaphors**. Analogies and metaphors function to construct, as well as describe and reinforce stereotypes (Expert Group “Innovation through Gender”, 2013). Take care not to send prejudices and stereotypes linked to sexism, homophobia, racism, disability or religious beliefs (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 122).
- **Visual displays of data** may embed gender assumptions (Expert Group “Innovation through Gender”, 2013).

Gender-sensitive visual displays of data

In the case study on Public Transportation, the charts below represent trips made in Madrid in 2007. The first chart (left below) graphs transportation data as traditionally collected and reported. It privileges paid employment by presenting it as a single, large category. Caring work (shown in red) is divided into numerous small categories and hidden under other headings, such as escorting, shopping and leisure.

The second chart (right) reconceptualises public transportation trips by collecting care trips under one category. Visualising care trips in one dedicated category emphasises the importance of caring work and allows transportation engineers to design systems that work well for all segments of the population, improve urban efficiency, and guard against global warming (Sánchez de Madariaga, 2011).



<https://genderedinnovations.stanford.edu/methods/language.html>

- Regarding the references citation and bibliography elaboration, it is important to use a gender-sensitive citation style that allow to make female authorships visible (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 72).

2.5.2. Communicating research findings: Ways of dissemination

- Use diversity of formats and ways of dissemination in order to communicate the findings of the research to several types of audiences –expert and non-expert–

(e.g. scientific community, NGOs, policy-makers, technical staff and service providers, participants and beneficiaries of the study, wider society...) (García Calvente, Jiménez Rodrigo, and Martínez Morante, 2010: 124).

- **“Appropriate methods for communicating research results** must be used:
 - For educational bureaucracies, academics and other interested parties (who need factual reports backed by data outlining causes and effects of gender, class, ethnicity, class and other biases) gender gaps and discrimination, narrative reports highlighting gaps, proportions and structures, and processes that cause or promote gender inequality may be used. These reports can be packaged appropriately showing graphs, charts and figures to outline the situations, to indicate causes and effects, and to suggest possible solutions to the gender related problems.
 - Popular media, press conferences, communiqués and interviews with specific news outlets may be used to present research findings.
 - For academic purposes, journal articles and seminars can be used to present and disseminate research findings” (UNESCO, 2015: 89).

- **“It is important to disseminate research findings**, especially to the **groups that provide data**, in order to sensitise them to the issues and enable them to utilise the findings to improve their situations” (UNESCO, 2015: 89).

“The communication methods you use will depend on the needs of your participants. For communities with low levels of literacy, this could involve announcements or interviews on the local radio, or putting on a community play. It can involve making the research available in different languages, including formats for people with disabilities, and asking local organisations to distribute it” (Morris and Bunjun, 2007: 37).

- **“Specific dissemination actions** (publications or events) for gender findings can be considered. Institutions and departments that focus on gender should be included in the target groups for dissemination” (European Commission, 2011, part 2.3).
- **“Ensure that research findings on gender issues are disseminated and brought into policy discussions** are critical (United Nations, 2002: 16).
- **“Using ICT to disseminate research findings**. It is necessary to use appropriate information technologies to communicate research results. Such technologies may include the following: internet (including online publications, websites list serves), radio, television, videos, video and teleconferences and webinars and CD-ROMs” (UNESCO, 2015: 90).

2.5.3. Implementing research findings

- **“Advocating for gender sensitive practices**. If the research has been gender sensitive, the findings should also highlight the gender dimension of the topic. The

findings could have a great impact on policies and, therefore, should propose equity measures, and promote equality and social inclusion” (Leduc, 2009: 4).

- “Analyse the problem or issue and proposed policy options for implications from a gender perspective and seek to identify means of **formulating directions** that support an equitable distribution of benefits and opportunities” (United Nations, 2002: 4).

“Research findings may already indicate or suggest solutions (UNESCO, 2015: 89):

- Gender gaps in appointments in staff and student bureaucracies can be addressed through targeted hiring; seeking and encouraging appropriately qualified candidates to apply for positions.
 - Depending on findings, it might be necessary to develop support policies, programmes and facilities for disadvantaged groups such as women, minorities and ethnic groups to acquire the necessary skills.
 - Scholarships for academically qualified minorities may be availed to enable them to compete for jobs and positions, and for female and minority students to qualify and apply for training.
 - If there are no short-term solutions, then longer term strategies have to be adopted to enable the disadvantaged groups to access positions and succeed in them.
 - Affirmative measures may be adopted to enable disadvantaged groups, such as women, to access training and other resources. Research findings are useful for demonstrating privilege and justifying affirmative action targeted to disadvantaged groups”.
- “Gender sensitive research should also identify the **impacts of new practices or policies on men and women**; who will benefit from these; who will be disadvantaged; and the impacts on men and women’s activities and relationships” (Leduc, 2009: 4).

2.6. Evaluation

- “**Monitoring efforts** not only allow measurement of the impact of initiatives and the progress made towards gender equality, they also enable identification of what can be improved. Monitoring is thus important for learning: to take on board the lessons from the practice and to improve what is carried out” (European Institute for Gender Equality, 2016: 50).
- “**Equality impact assessments** are at the heart of equality and/or non-discrimination mainstreaming” (Crowley, 2009:9).

Several tools for gender evaluation of the research are attached as annexe 2.

References

- Asian Development Bank. 2013. "Tool Kit on Gender Equality Results and Indicators". <https://www.oecd.org/derec/adb/tool-kit-gender-equality-results-indicators.pdf>.
- Bauer, Greta R., 2014. "Incorporating Intersectionality Theory into Population Health Research Methodology: Challenges and the Potential to Advance Health Equity". *Social Science and Medicine* 110: 10–17.
- Bowleg, Lisa, 2008. "When Black + Lesbian + Woman ≠ Black Lesbian Woman : The Methodological Challenges of Qualitative and Quantitative Intersectionality Research". *Sex Roles* 59: 312–25.
- Bowleg, Lisa, and Greta Bauer, 2016. "Invited Reflection: Quantifying Intersectionality". *Psychology of Women Quarterly* 40 (3): 337–41.
- Brabeck, Mary, and Katharina M. Brabeck, 2014. "Feminist ethics applied to participatory action research". In *Encyclopedia of action research*, edited by David Coglán, and Mary Brydon-Miller, 340-343. Thousand Oaks: SAGE Publications.
- Castro, Paola De, Shirin Heidari, and Thomas F. Babor, 2010. "Sex and Gender Equity in Research (SAGER): Reporting Guidelines as a Framework of Innovation for an Equitable Approach to Gender Medicine". *Ann Ist Super Sanità* 46 (1): 66–80.
- Centre for Strategy and Evaluation Services, 2007. "Non-Discrimination Mainstreaming– Instruments, Case Studies and Way Forwards". <https://www.ec.europa.eu/social/BlobServlet?docId=1426&langId=en>.
- Choo, HaeYeon, and Myra M. Ferree, 2010. "Practicing Intersectionality in Sociological Research : A Critical Analysis of Inclusions, Interactions, and Institutions in the Study". *Sociological Theory* 28 (2): 129–49.
- Crowley, Niall, 2009. "Good Practice Exchange Seminar on Non- Discrimination Mainstreaming". Exchange Organizational Behavior Teaching Journal. http://ec.europa.eu/justice/discrimination/files/sem_mainstream_helsinki2009_en.pdf.
- Else-Quest, Nicole M., and Janet S. Hyde, 2016. "Intersectionality in Quantitative Psychological Research: I. Theoretical and Epistemological Issues". *Psychology of Women Quarterly* 40 (3): 1–16.
- European Commission, 2011a. "Compendium of Practice on Non-Discrimination / Equality Mainstreaming".
- . 2011b. "Toolkit Gender in EU-Funded Research". <https://web.infn.it/CUG/images/alfresco/Risorse/EC/2011ToolkitGenderEuFundedResearch.pdf>.

European Institute for Gender Equality, 2016. "Gender Equality in Academia and Research. GEAR Tool".

http://ec.europa.eu/justice/discrimination/files/compendium_mainstreaming_equality_en.pdf.

Expert Group "Innovation through Gender", 2013. "Gendered Innovations. How Gender Analysis Contributes to Research". European Commission. <https://ec.europa.eu/programmes/horizon2020/en/news/%E2%80%9Cgendered-innovations-how-gender-analysis-contributes-research%E2%80%9D>.

García Calvente, María del Mar, María Luisa Jiménez Rodrigo, and Emilia Martínez Morante, 2010. *Guía para incorporar la perspectiva de género a la investigación en salud*. Granada: Escuela Andaluza de Salud Pública. <http://www.easp.es/project/guia-para-incorporar-la-perspectiva-de-genero-a-la-investigacion-en-salud/>

GENDER-NET, 2016. "GENDER-NET Report Manuals with Guidelines Sex and Gender Analysis Recommendations and Indicators". http://www.gender-net.eu/IMG/pdf/GENDER-NET_D3-11_Manuals_with_guidelines_on_the_integration_of_sex_and_gender_analysis_into_research_web.pdf.

Hankivsky, Olena, Renee Cormier, and Diego de Merich, 2009. "Intersectionality: Moving Women's Health Research and Policy Forward". Vancouver: Women's Health Research Network. http://bcewh.bc.ca/wp-content/uploads/2012/05/2009_IntersectionalityMovingwomenshealthresearchandpolicyforward.pdf.

Heidari, Shirin, Thomas F. Babor, Paola De Castro, Sera Tort, Mirjam Curno, De Hoffman, AJ Tarzian, et al., 2016. "Sex and Gender Equity in Research: Rationale for the SAGER Guidelines and Recommended Use". *Research Integrity and Peer Review* 1 (1): 1–9.

Leduc, Brigitte, 2009. "Guidelines for Gender Sensitive Research". <http://www.icimod.org/resource/1291>.

Morris, Marika, 1999. *Shaping Women's Health Research: scope and methodologies*. Atlantic Centre of Excellence for Women's Health (ACEWH) / Centres of Excellence for Women's Health (CEWH). https://www.dal.ca/content/dam/dalhousie/pdf/diff/ace-women-health/ACEWH_shaping_womens_health_research.pdf.

Morris, Marika, and Benita Bunjun, 2007. *Using Intersectional Feminist Frameworks in Research. A Resource for Embracing the Complexities of Women's Lives in the Stages of Research*. Ottawa: Canadian Research Institute for the Advancement of Women (CRIAOW).

- Moser, Caroline O. N., 1993. *Gender Planning and Development: Theory, Practice and Training*. London and New York: Routledge.
- Parent, Mike C., Cirleen De Blaere, and Bonnie Moradi, 2013. "Approaches to Research on Intersectionality: Perspectives on Gender, LGBT, and Racial/Ethnic Identities". *Sex Roles* 68 (11–12): 639–45.
- Purdie-Vaughns, Valerie, and Richard P. Eibach, 2008. "Intersectional Invisibility: The Distinctive Advantages and Disadvantages of Multiple Subordinate-Group Identities". *Sex Roles* 59 (5–6): 377–91.
- Rouhani, Setareh, 2014. "Intersectionality-Informed Quantitative Research: A Primer". The Institute for Intersectionality Research & Policy, SFU.
http://www.sfu.ca/iirp/documents/resources/QuantPrimer_Final_v4.pdf.
- Sánchez de Madariaga, Ines, 2012. "The Mobility of Care: A New Concept in Urban Transportation". In *Fair Share Cities. The Impact of Gender Planning in Europe*, edited by Ines Sánchez de Madariaga, and Marion Roberts. London: Ashgate.
- Scott, Nick, and Janet Siltanen, 2012. *Gender and Intersectionality – a Quantitative Toolkit for Analyzing Complex Inequalities*.
<http://www.janetsiltanen.ca/toolkitenglish.pdf>.
- Spierings, Niels, 2012. "The Inclusion of Quantitative Techniques and Diversity in the Mainstream of Feminist Research". *European Journal of Women's Studies* 19 (3): 331–47.
- Stoetzler, Marcel, 2016. "Intersectional Individuality: Georg Simmel's Concept of 'The Intersection of Social Circles' and the Emancipation of Women". *Sociological Inquiry* 86 (2): 216–40.
- The CIHR Institute of Gender and Health, 2004. "What's Sex and Gender Got to Do With It ? Integrating Sex and Gender into Health Research".
<http://publications.gc.ca/site/eng/9.690999/publication.html>.
- Trbovc, JovanaMihajlovic, and Ana Hofman, 2015. "Toolkit for Integrating Gender-Sensitive Approach into Research and Teaching".
http://eige.europa.eu/sites/default/files/garcia_toolkit_gender_research_teaching.pdf.
- UNESCO, 2015. *A Guide for Gender Equality in Teacher Education Policy and Practices*.
<http://unesdoc.unesco.org/images/0023/002316/231646e.pdf>.
- United Nations, 2002. *Gender Mainstreaming. An Overview*.
www.un.org/womenwatch/osagi/pdf/e65237.pdf%0A.

Warner, Leah R., 2008. "A Best Practices Guide to Intersectional Approaches in Psychological Research". *Sex Roles* 59 (5–6): 454–63.

Women's Rights and Economic Change, 2004. Intersectionality: A Tool for Gender and Economic Justice.

https://lgbtq.unc.edu/sites/lgbtq.unc.edu/files/documents/intersectionality_en.pdf.

Web resources

- Canadian Research Institute for the Advancement of Women
<http://www.criaw-icref.ca/en/>
- EGERA. Effective Gender Equality in Research and the Academia
<http://www.egera.eu/>
- GARCIA. Gendering the Academy and Research: Combating Career Instability and Asymmetries
<http://garciaproject.eu/>
- GENDER IN RESEARCH TOOLKIT AND TRAINING
www.yellowwindow.com/genderinresearch
- GENDERED INNOVATIONS
<https://genderedinnovations.stanford.edu/>
- GENISLAB. Gender In Science And Technology Lab
<http://www.genislab-fp7.eu/>
- GENOVATE. Transforming Organisational Culture for Gender Equality in Research and Innovation
<http://www.genovate.eu/>
- Sex, Gender and Health Research Guide: A Tool for CIHR Applicants
<http://www.cihr-irsc.gc.ca/e/32019.html>
- Gender Equality in Academia and Research - GEAR tool
<http://eige.europa.eu/gender-mainstreaming/tools-methods/GEAR>
- GenPORT
<http://www.genderportal.eu/>
- INTERSECTIONAL RESEARCH DATABASE
<http://ird.crge.umd.edu/>
- INTEGER project
<http://www.integer-tools-for-action.eu/en/resource/assessment-toolkit>

Annexes

Annexe 1. Gender/intersectional academic databases

- STUDIES ON WOMEN & GENDER ABSTRACTS
<http://www.tandfonline.com/db/cswa>
- GENDER WATCH
<http://www.proquest.com/products-services/genderwatch.html>
- GENDER STUDIES DATABASE
<https://www.ebscohost.com/academic/subjects/category/gender-studies>
- INTERSECTIONAL RESEARCH DATABASE
<http://ird.crge.umd.edu/>
- LGBT LIFE WITH FULL TEXT
<https://www.ebscohost.com/academic/lgbt-life-with-full-text>

Annexe 2. Checklists for integrating gender perspective into research

CHECKLIST FOR GENDER IN RESEARCH (European Commission, 2011b)

Equal opportunities for women and men in research

- Is there gender balance in the project consortium and team, at all levels and in decision-making positions?
- Do working conditions allow all members of staff to combine work and family life in a satisfactory manner?
- Are there mechanisms in place to manage and monitor gender equality aspects, e.g. workforce statistics, as required by FP7?

Gender in research content

Research ideas phase:

- If the research involves humans as research objects, has the relevance of gender to the research topic been analysed?
- If the research does not directly involve humans, are the possibly differentiated relations of men and women to the research subject sufficiently clear?
- Have you reviewed literature and other sources relating to gender differences in the research field?

Proposal phase:

- Does the methodology ensure that (possible) gender differences will be investigated: that sex/gender differentiated data will be collected and analysed throughout the research cycle and will be part of the final publication?
- Does the proposal explicitly and comprehensively explain how gender issues will be handled (e.g. in a specific work package)?
- Have possibly differentiated outcomes and impacts of the research on women and men been considered?

Research phase:

- Are questionnaires, surveys, focus groups, etc. designed to unravel potentially relevant sex and/or gender differences in your data?
- Are the groups involved in the project (e.g. samples, testing groups) gender-balanced?
- Is data analysed according to the sex variable? Are other relevant variables analysed with respect to sex?

Dissemination phase:

- Do analyses present statistics, tables, figures and descriptions that focus on the relevant gender differences that came up in the course of the project?
- Are institutions, departments and journals that focus on gender included among the target groups for dissemination, along with mainstream research magazines?
- Have you considered a specific publication or event on gender-related findings?

CHECKLIST FOR APPLYING GENDER-SENSITIVE APPROACH IN RESEARCH (Trbovc and Hofman, 2015)

- Are you considering increasing diversity of your project team?
- Are you deterring hierarchical gendered relations in your team?
- Are you discouraging gender segregation in your team?
- Are the working conditions within the project shaped in the way that accommodates men and women equally?
- Did you have both men and women in mind when you formulated the research question?
- Have you checked if men and women are differently related to the research problem you want to deal with?
- Have you looked for gender-sensitive studies while preparing literature review for your research?
- Have you checked if you are projecting stereotypical gender roles?
- Do you have male and female specimen in your research sample?
- Is your methodology tackling the issues relevant to both women and men?
- Is the language you are using gender-sensitive?
- Do you disaggregate data by sex?
- Do you have an equal number of both sexes/genders in your sample?
- Do you report data in a gender-sensitive way?
- Have you checked how different genders will use the project results in different ways?
- Will project results benefit the lives of both women and men?
- Does your research relate to gender inequalities into research and teaching the society?

CHECKLIST FOR GENDER SENSITIVE RESEARCH (Leduc, 2009)

1. Acknowledge our own bias.
2. Identify the human and social components of the research object.
3. Define a conceptual framework reflecting men's and women's experiences.
4. Avoid male bias, prejudices and double standards.
5. Develop a gender sensitive methodology.
6. Build a gender balanced research team.
7. Choose a gender balanced sample.
8. Give value to both men's and women's experiences.
9. Use and produce gender disaggregated data.
10. Conduct a gender analysis.
11. Anticipate impacts of new policies or practices on men and women.
12. Use gender sensitive language in the research report.

CHECKLIST (GENDER-NET, 2016)

This checklist is designed to assist researchers and grant applicants in implementing the necessary steps for integrating the gender analysis into their research projects. It will guide users through the main stages of the research cycle in identifying the main elements to take into account when designing appropriate gender-sensitive research.

- Does your research approach clearly articulate sex and/or gender relevance to the research topic?
- Have you addressed how research findings from your study will apply to the specific needs of men and/or women?
- Have you appropriately applied the insights from your literature review on similarities and differences between men and women (or female/male animals, tissues and cells) to your research design?
- Have you included a systematic analysis and assessment of sex and/or gender in your research questions and hypothesis?
- Where relevant, does your methodology specify appropriate representation of the research sample in terms of sex and/or gender?
- Have you included a mechanism to disaggregate your data by sex and other gender-related variables (e.g. marital status, professional status, etc.) both at the collection and at the analysis stages?
- Have you considered other intersecting factors with sex and gender (e.g. age, ethnicity, disability, religion, sexual orientation...) in your methodology?
- Do you have a dissemination/knowledge translation plan to facilitate effective use of the sex and/or gender outcomes from your research?
- Are there any ethical implications relating to sex and/or gender that you need to address in your research?

SAMPLE EVALUATION QUESTIONS ON GENDER EQUALITY (Asian Development Bank, 2013)

Human Capital

1. Has there been an increase in women's or girls' access to health, education, information, training, or other services? How does this compare to men's or boys' access to these services? Did the program address women's greatest needs for human capital?

Economic Empowerment

2. Has there been an increase in women's access to or control over productive resources, services, or assets, including resources provided by the program? How does this compare to men's access to these resources, services, and assets? (Consider land, property, employment, income, information, financial services, and other economic opportunities.) Did the program address the key barriers to women's economic empowerment and build on their strengths?

Voice and Rights

3. Have women been empowered to claim their rights in public and private spheres? Have women participated equally with men in the program, including decision making and leadership? Has the program challenged or changed the attitudes on women's and girls' rights (including attitudes on violence against women), strengthened women's knowledge of their rights, or fostered a greater understanding of women's rights among men and boys?

Gender Capacity Building

4. Is sex-disaggregated data regularly collected and analysed? Have gender and social analysis skills been strengthened among key stakeholders, including their capacity to develop, implement, and monitor gender strategies? Is there a greater understanding of gender issues in the sector, and the most effective strategies to address women's needs and priorities, as well as those of men?

Lessons Learned about Constraints, Strategies, and Sustainability

5. What factors and strategies helped to foster positive changes toward gender equality? What constrained the achievement of equal participation, benefits, and outcomes for women and girls?
6. Were there some program components where men or boys benefited much more than women or girls, and what contributed to this?
7. Were there any unintended positive or negative changes in gender relations? What factors and strategies contributed to these changes?
8. Are positive changes in gender relations likely to be sustained? What factors will contribute to this, and what is likely to undermine the sustainability of positive changes?
9. How did any changes in gender results affect the achievement of the overall program goal and outcomes? Have positive changes toward gender equality helped to achieve outcomes, effectiveness, efficiency, or sustainability of the program?
10. What changes need to be made to enhance progress toward gender equality (in this program, or in other similar programs)?



This report has been produced within the framework of the project “Tackling multiple discrimination in Greece: Delivering equality by active exploration and enabling policy interventions”, which is co - funded by the Rights, Equality and Citizenship (REC) Programme of the European Union. Its contents are the sole responsibility of its author and can in no way be taken to reflect the views of the European Commission.