



# *Gender Equality Audit and Monitoring (GEAM) Training Workshop*



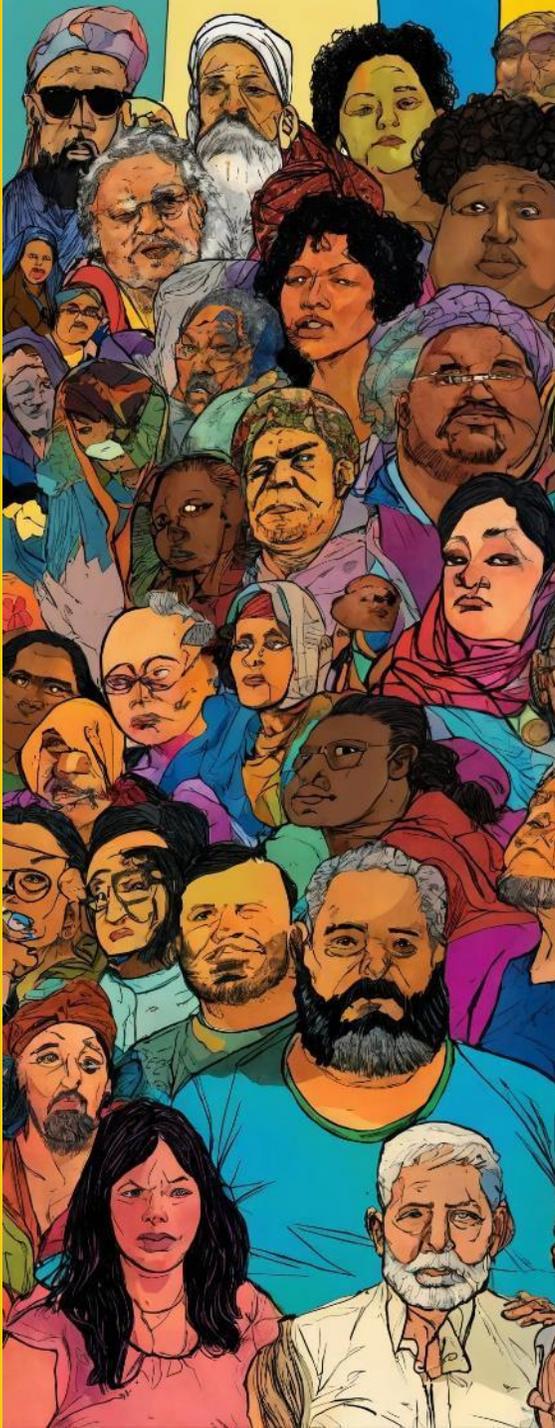
Jörg Müller, PhD  
Universitat Oberta de Catalunya



**Online Training Workshop**

29<sup>th</sup> and 31<sup>st</sup> of May 2024  
14:00-17:00 CET

# Workshop Overview



## 1 29<sup>th</sup> of May 2024 Understanding the GEAM

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Purpose, main components,  
workflow, key concepts

## 2 31<sup>st</sup> of May 2024 Hands-on training

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Using LimeSurvey, adapting  
GEAM content

# Wednesday 29<sup>th</sup> of May

## 14:00-17:00

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TIME	CONTENT
14:00-14:15	Introduction and welcome
14:15-15:00	Understanding the GEAM
15:00-15:30	User experiences + Q&A
15:30-15:45	BREAK
15:45-16:45	Key concepts for intersectional / equality data collection and reporting (15 min Q&A)
16:45-17:00	Preparing for session II
17:00	Closing of session I

# *Learning Outcomes*

Understand the architecture of the **GEAM infrastructure** and services

Get an overview of the **basic components** (indicators) of the GEAM questionnaire for employees and for students

Provide a **conceptual** foundation for **equality data collection** from an intersectional perspective

Hands-on **practice** with online survey platform LimeSurvey

1

Understanding the GEAM

GEAM version 2



**Advance HE**

Amanda Aldercotte

Kevin Guyan

**UOC**

Jörg Müller,

Serig Yanes

**Notus**

Maria Caprile

**Jagiellonian University**

Ewa Krzaklewska

Paulina Sekula

*GEAM  
Credits*

GEAM version 3



**INSPIRE**

**Notus**

Maria Caprile

Dalia Argudo

**Jagiellonian University**

Ewa Krzaklewska

Paulina Sekula

**UOC**

Jörg Müller

Beatriz López

# Translations – GEAM Employees

**Bosnian.** Translated by Amina Katica, University Sarajevo School of Science and Technology (Bosnia and Herzegovina)

**Czech.** ACT - Translated and revised by Jarmila Lancošová, Czech Academy of Sciences (Czech Republic)

**French.** ACT - Évaluation et suivi de l'égalité des genres/sexes (GEAM) Translated and revised by Florian Beauvallet (Translation expert), Anne-Sophie Godfroy (Université Paris-Est Créteil and ENS-PSL), Areti Damala (CNRS) and Colette Guillopé (Université Paris-Est Créteil and Femmes et Sciences).

**German.** ACT - Audit und Monitoring von Gleichstellungsdaten (GEAM) Translated and revised by Kathrin Rabsch, TU Berlin (Germany)

**Greek.** ACT- Έλεγχος και Παρακολούθηση της Ισότητας Φύλων (GEAM) Translated and revised by Leonidas Antoniou, Research & Innovation Policy expert (Cyprus)

**Italian.** ACT - Valutazione e Monitoraggio della Parità di Genere (GEAM) Translated and revised by Natasha Segà, SmartVenice (Italy), Revised by Natalina Stamile, University of Brescia (Italy)

**Lithuanian.** ACT - Lyčių lygybės auditas ir stebėjimas (GEAM) Translated and revised by Aurelija Novelskaite, Vilnius University (Lithuania)

**Portuguese.** ACT - Questionario de auditoria e monitorização da igualdade de género (GEAM) Translated and revised by Ana Petronilho, Universidade Nova de Lisboa (Portugal)

**Polish.** ACT – Monitoring równości płci (GEAM) Translated and revised by Ewa Krzaklewska, Paulina Sekuła and Marta Warat, Uniwersytet Jagielloński (Poland)

**Romanian.** ACT – Audit și Monitorizare a Egalității de Gen (GEAM) Translated and revised by Alisa Petroff, UOC (Spain) and Ana Tamas, Babez-Bolyai University (Romania).

**Serbian.** ACT – Translated and revised by Balsa Delibasic, University of Belgrade (Serbia)

**Slovenian.** ACT - Vprašalnik o stanju na področju enakosti spolov (GEAM) Translated and revised by Ana Hofman, Jovana Mihajlović, Research Centre of the Slovenian Academy of Sciences and Arts (Slovenia)

**Spanish.** ACT - Cuestionario de auditoría y monitoreo de la igualdad de género (GEAM) Translated and revised by Blas Fernandez, FLACSO (Argentina) and Sergi Yanes and Beatriz López, UOC (Spain)

**Turkish.** Mary Lou O'Neil and Selma Değirmenci, Kadir Has University (Turkey).

**Ukrainian.** ACT - Моніторинг гендерної рівності (GEAM) Translated and revised by Tetiana Median, Chernivtsi National University (Ukraine)

# *Translations – GEAM Students*

## **Polish.**

Ewa Krzaklewska, Paulina Sekuła and Marta Warat, Uniwersytet Jagielloński (Poland)

## **Spanish.**

Dalia Argudo (Notus), Spain.

# Some Reading ...

- Guyan, Kevin, Amanda Aldercotte, Jörg Müller, Maria Caprile, and Sergi Yanes Torrado. 2022. **“The Development of the Gender Equality Audit and Monitoring Survey.”** Pp. 44–63 in *A Community of Practice Approach to Improving Gender Equality in Research*, edited by R. Palmen and J. Müller. London ; New York: Routledge. <https://doi.org/10.4324/9781003225546-3>
- Aldercotte, Amanda, Maria Caprile, Kevin Guyan, Memory Malibha-Pinchbeck, Jörg Müller, Rachel Palmén, and Carla Startin. 2021. *ACT - Gender Equality Audit and Monitoring (GEAM) - Version 2*. Zenodo. doi: [10.5281/zenodo.5348197](https://doi.org/10.5281/zenodo.5348197).

# *GEAM in a Nutshell*

Survey for higher education and research organizations, gathering baseline data to **design effective** gender equality plans

Standardized & adaptable, comprehensive & transnational (for practitioners with little experience in social sciences)

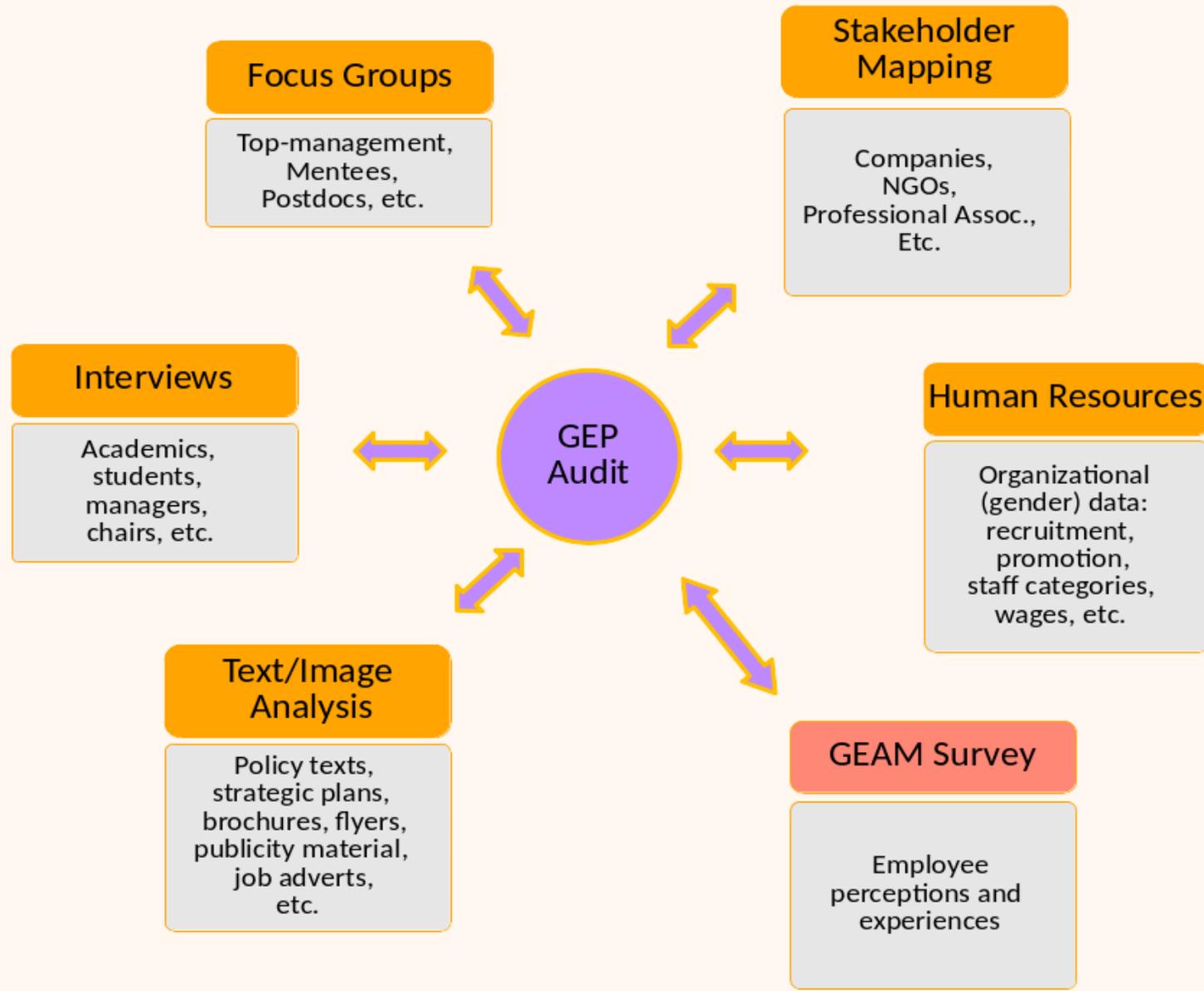
**Open** survey reporting infrastructure

Since 2020, **+50 organizations** have used the GEAM, generating +10K responses

Developed H2020 ACT project. Extended, updated: INSPIRE project



**High quality-, comparable data** to facilitate dialog and learning within and across organizations on GEPs.

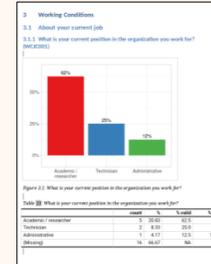


# Why use the GEAM?

**1. ORGANIZATIONAL DATABASE**  
HR  
payroll,  
enrollment, ...



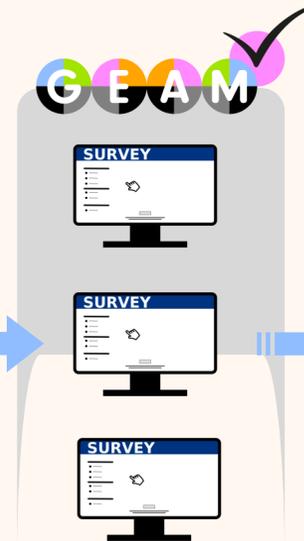
Reporting



**ADVANTAGE**  
Centralized,  
reliable, exact

**DISADVANTAGE**  
Partial  
organizational  
assessment

**2. EMPLOYEES**  
(staff, students,  
...)  
perceptions  
opinions  
experiences



Reporting



**ADVANTAGE**  
- experiences of GBV  
- external responsibilities  
- existing awareness  
- job satisfaction  
- perceptions of GE

**DISADVANTAGE**  
Less harmonized data,  
requires additional  
resources

# *GEAM provides insights*

About individual **experiences** of employees or students of discrimination

**Perceptions, awareness, beliefs** among employees regarding different aspects of organizational reality and cultural values

**Factual** working conditions of employees (e.g. fixed term or temporary contract)

**Socio-demographic** variables: age, gender, sexual orientation, disability/illness, partnership status, ethnic/racialized group, trans-history, class, nationality → intersectional analysis.

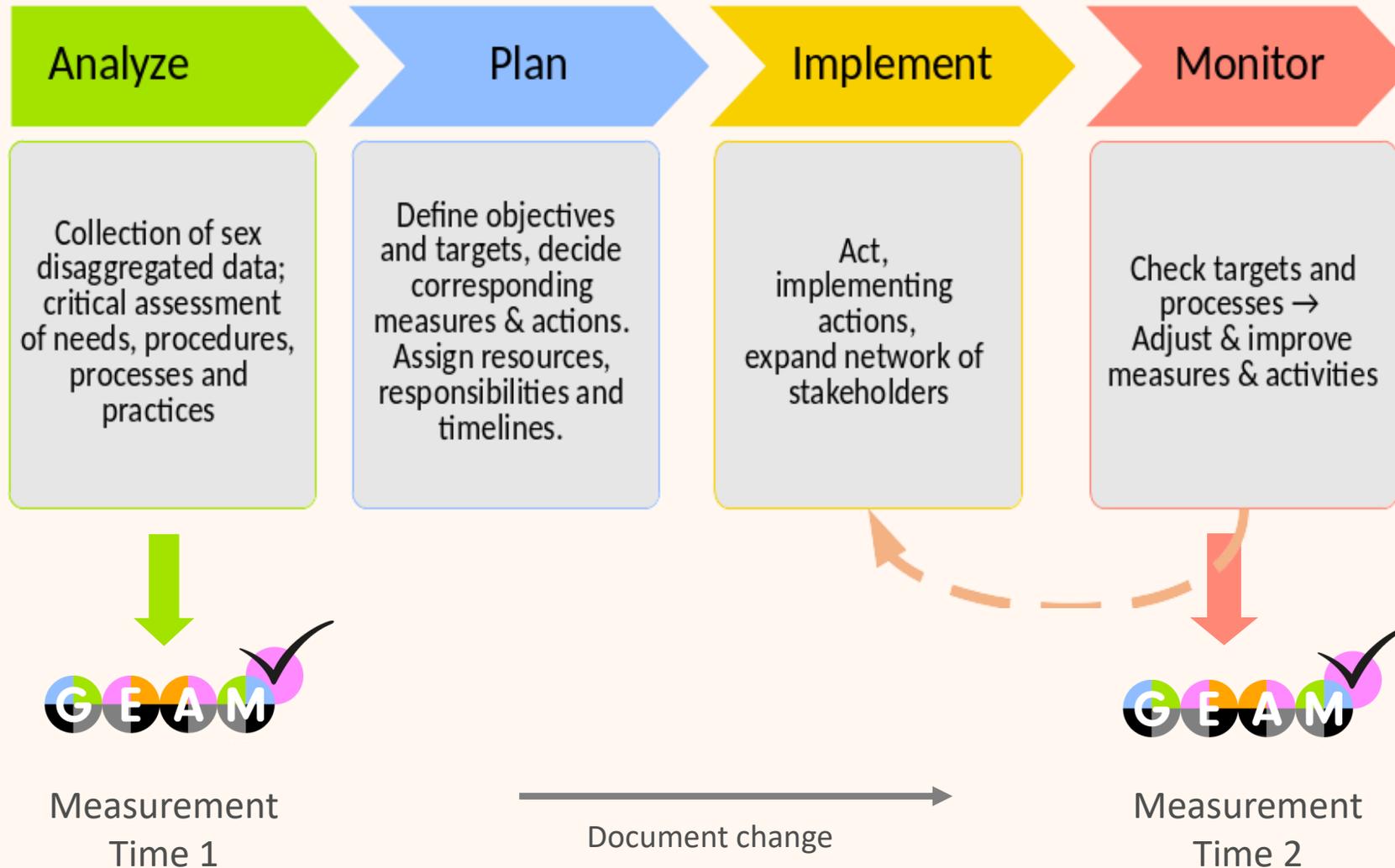


Goes beyond administrative data collection (e.g. head count)



Yet, through adequate statistical analysis, findings generalize to the organizational level

# Gender Equality Plan – Phases



## GEAM Employees v3.0

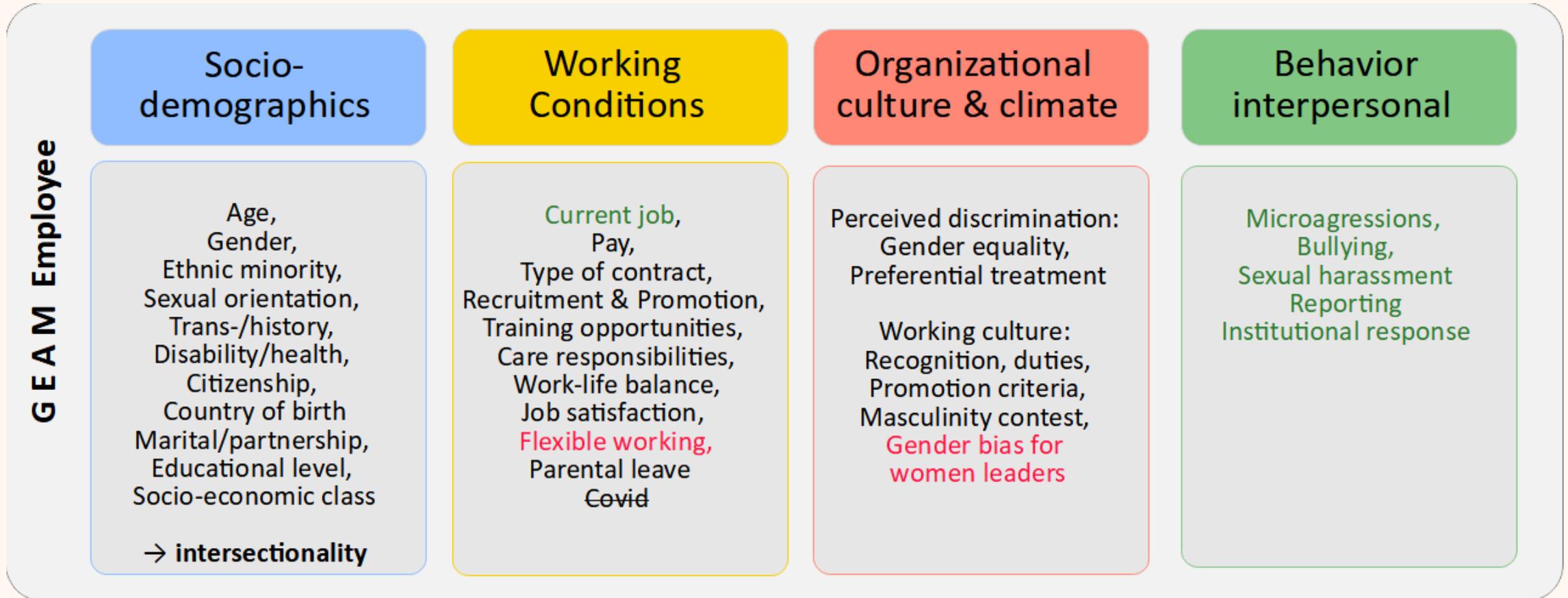
- Better filtering of questions and answer items to distinguish between **administrative** versus **academic staff**
- Explicit questions about **teaching** responsibilities
- Explicit question about **leadership** responsibilities
- New **teleworking** module (revised and generalised Covid items)
- Update and revise modules on **sexual harassment and bullying**
- New items on bias against women in **leadership positions**

*What's new?*

## GEAM Student v1.0

- Based upon GEAM v2 employees but specifically adapted to the student situation.
- Important revision of gender-based violence surveys, based upon UniSafe work to construct new module

# GEAM v3.0 Employee Components



Browse content → <https://surveys.geamtool.eu/index.php/530000?lang=en>

# *Employees – Socio-demographics*

## **Part I (start of questionnaire)**

- Year born (age)
- Gender

## **Part II (end of questionnaire)**

- Current marital or partnership status
- Ethnic or racialized majority or minority group
- Country of birth
- Main citizenship
- Trans or trans-history
- Sexual orientation
- Disability, impairments, long-term health
- Highest qualification
- Highest qualification of parents/guardian (socio-economic class)

# *Employees – Working Conditions*

## **Current job**

- Position: Admin, Technician, Academic/ research)
- Role (context-dependent)
- Leadership position
- Teaching responsibilities

## **Pay**

- Annual salary
- Bonus

## **Type of contract**

- Full-time / part-time
- Permanent or temporary contract

- Recruitment and promotion
- Training opportunities

## **Caring responsibilities**

- Caring for children or dependent adults; how many?
- Single parent or carer

## **Work-life balance**

- ISSP – 4 items work-family conflict scale
- EWCS – 4 items job satisfaction
- EWCS – 2 items on work intensity

# *Employees – Working Conditions*

## **Flexible working arrangements (new)**

- Opportunities available
- Frequency, reasons, prioritise improvements

## **Parental leave**

- Uptake of parental leave & duration
- Measures to support leave and return to work
- Usefulness of available measures
- Reasons for not taking parental leave

# Employees – Cultura and Climate

## Perceived discrimination

- 5 items perception of gender equality
- 12 items on preferential treatment: differences in the allocation of ... ?

## Working culture

- 9 items recognition and appraisal of work
- 5 items on promotion criteria
- 8 items Masculinity Contest Culture
- 6 items Gender bias scale for women leaders (new)

**Example** item for perceived discrimination (OCPER001), using a 5 item Likert Scale Agreement – disagreement.

*"In general, men and women are treated equally in my organization"*

*"In general, men and women are equally represented (in terms of numbers) in my organization"*

# Employees – Behaviour – Bullying, Harassment, Microaggression

## Microaggressions

- Personal experiences of microaggressions / frequency

## Bullying

- Personal experiences of bullying / frequency

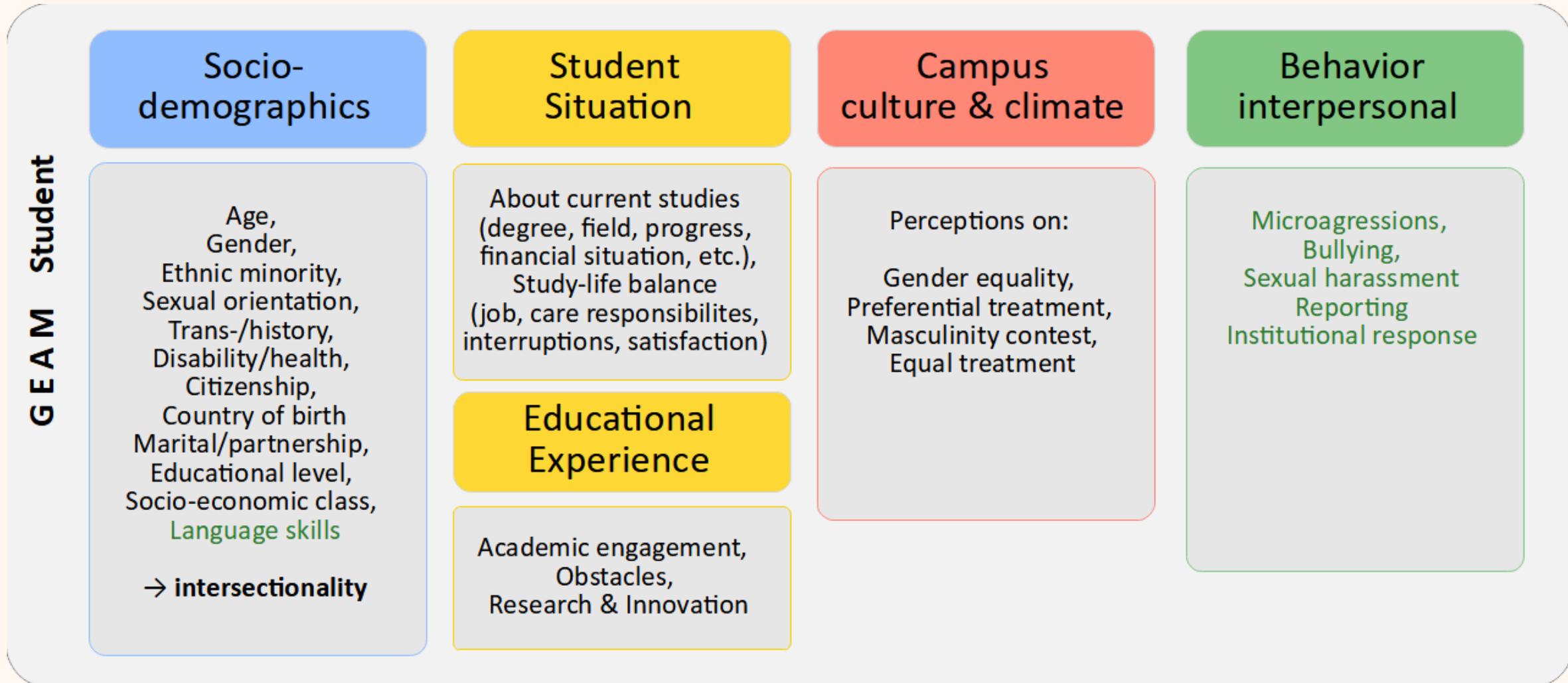
## Sexual and/or sexist harassment

- Personal experiences of sexual harassment / frequency
- Reporting of those incidents
- Experience of institutional response and confidence
- Who (broad categories) was the perpetrator?
- Witnessed situations of microaggressions, bullying or harassment.

## Draws upon:

Lipinsky, A., Schredl, C., Baumann, H., Lomazzi, V., Freund, F., Humbert, A. L., Tanwar, J., & Bondestam, F. (2021). *UniSAFE D4.1 Final UniSAFE-Survey Questionnaire*. <https://doi.org/10.5281/zenodo.7220636>

# GEAM v1.0 Student Components



# Students – Socio–demographics

## Part I (start of questionnaire)

- Year born (age)
- Gender

## Part II (end of questionnaire)

- Current marital or partnership status
- Ethnic or racialized majority or minority group
- Country of birth
- Main citizenship
- Trans or trans-history
- Sexual orientation
- Disability, impairments, long-term health
- Highest qualification
- Highest qualification of parents/guardian (socio-economic class)
- **Language skills**

# *Students – Student Situation*

## **Current studies**

- Type of degree
- Field of study
- Year(s) enrolled
- Full-time / part-time
- Economic support
- Study language

## **Study-life balance**

- Time allocation (combine study and job)
- Care responsibilities
- Interruption of studies / dropping out
- Student satisfaction
- Stress/workload/burnout

# *Students – Educational Experience*

- 10 items academic engagement
- 14 items obstacles to academic success
- Plans after graduation
- Research & innovation career

# *Students – Campus/Student Culture*

## **Perceived discrimination at organisational level**

- Gender Equality
- Preferential treatment

## **Perceived discrimination in student environment**

- Perceptions of student environment
- Masculinity contest culture
- Equal treatment

# Students – Behaviour – Bullying, Harassment, Microaggression

## Microaggressions

- Personal experiences of microaggressions / frequency

## Bullying

- Personal experiences of bullying / frequency

## Sexual and/or sexist harassment

- Personal experiences of sexual harassment / frequency
- Reporting of those incidents
- Experience of institutional response and confidence
- Who (broad categories) was the perpetrator?
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# GEAM Integrated Infrastructure

Survey Platform  
GEAM Template  
Documentation



Customize



Launch



Reporting  
(Template)



# *Sustainability – Open Philosophy*

- **GEAM Questionnaires**

Export/import survey structure as LimeSurvey Survey Archive file.  
Explore <https://surveys.geamtool.eu/index.php/530000?lang=en>

- **Translations**

English → German, Spanish, Portuguese, Polish, Lithuanian, Ukrainian, Italian, Greek, Slovenian, Serbian, Romanian, Czech, French, Turkish, Bosian,

- **Documentation / Modules**

Website, GEAM Manual → <https://geam.act-on-gender.eu>

- **Reporting**

Template based on R + bookdown. → <https://github.com/actongender/geam-report>

- **Analysis**

GEAM Analysis example code + instructions in R + bookdown  
<https://github.com/actongender/geam-analysis>

# *Take-home points*

- The GEAM is **free to use** (supported by INSPIRE)
- **Saves time** for developing and reporting
- Needs to be **adapted** by institutional context
- You **own the data** you generate

**BUT:** Turning data into insights remains a challenge.

# Getting Started

Organisational Culture and Climate - Gender Equality

The following section addresses your overall perceptions regarding gender equality in your work environment.

© ICEEESCI. Please indicate the extent to which you agree or disagree with the following statements:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
In general, men and women are equally represented in terms of academic titles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In general, men and women are equally represented in terms of administrative positions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My supervisor is committed to promoting gender equality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Myself and colleagues view men and women as having different skills related to gender equality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Explore the GEAM Questionnaires:

Employees: <https://surveys.geamtool.eu/index.php/530000?lang=en>

Students: <https://surveys.geamtool.eu/index.php/100100?lang=en>



Check the documentation

<https://geam.act-on-gender.eu>

Forthcoming GEAM Open Training Unit (INSPIRE)

Request an account:

[info@act-on-gender.eu](mailto:info@act-on-gender.eu) OR [info@geamtool.eu](mailto:info@geamtool.eu)



# User experiences

## Harvey Evans

- Germans Trias i Pujol Research Institute, Barcelona

## Hossein Ghaemi

Inst. of Naval Architecture  
 Faculty of Mechanical Eng. and Ship  
 Technology  
 Gdansk University of Technology

... others?!

<https://www.germanstrias.org/en/>



<https://wimio.pg.edu.pl/en/ibo-en>

# 2

## Key Concepts for Intersectional / Equality Data Collection

# What is Equality Data?

“Equality data is defined as **any piece of information** that is useful for the purposes of describing and analyzing the state of equality. The information may be **quantitative or qualitative** in nature.” (EC 2021b)

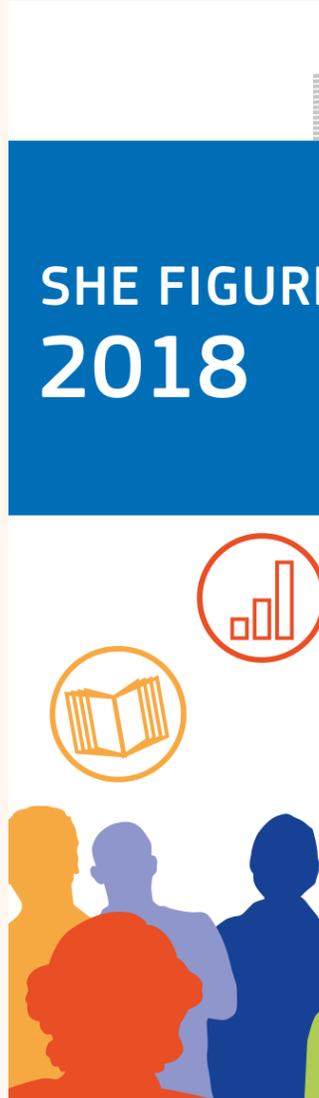
“Sources of equality data include population censuses, administrative registers, household and individual surveys, victimisation surveys, **attitudinal surveys (self-report surveys)**, complaints data, discrimination testing, diversity monitoring by employers and service providers, as well as qualitative research strategies such as case studies, indepth and expert interviews.” (EC 2021b)

## Feminism & quantitative data – a contested relation!

Quantitative data is instrumental for social justice.

**BUT**

What gets measures can already be biased!

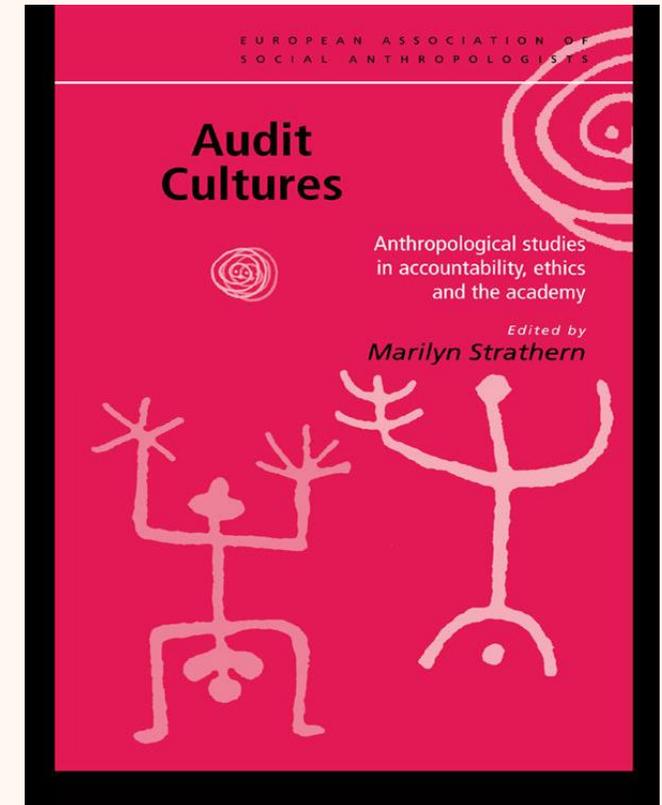


# Governance through indicators

## Quantification is on the rise world wide

- Indicators have a **knowledge effect**: comparable “facts” but without context and history
- Indicators have a **governance effect**: basis for decision making.

“**Benchmarking**” as technique of governance, which ...  
... **de-politicizes decisions.**



# *Principles of Equality Data Collection*

## Purpose

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More data does not automatically imply more justice! Collect data to the **benefit of the involved community**; do no harm. Requires a Theory of Change: clear idea what/how to change.

## Participation

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**Nothing about us – without us.** Stakeholder participation is key for adapting categories, identifying real needs, foreseeing possible risks and preventing data misuse. Co-ownership of data from start to finish.

## Self-identification

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Right to **self-determination**. Question and critically reflect on existing/official categories used (e.g. ethnicity) to **prevent further stigmatization**. Participants should have the option to disclose or withhold information about their personal characteristics.



# Principles of Equality Data Collection

## Anonymity

Respondents are **not linked to the information** they provide. Has technical dimension (Survey platform) and case-based dimension (disclosure control / small-N). **Privacy** guarantees control over “your” information; **confidentiality** prevents unauthorized access.

## Consent

Inform about legal framework, different purposes, and how data will be processed and protected. **Requires explicit affirmation** freely given, specific and unambiguous.

## Data disaggregation

Data needs to be sufficiently disaggregated in order to identify and **measure inequalities** between different social groups.

→ Intersectionality!





# General Data Protection Regulation (GDPR)

## Personal data

- Identifiers such as name, ID, location data, social security, etc.

## Sensitive personal data:

- racial or ethnic origin,
- political opinions,
- religious or philosophical beliefs;
- trade-union membership;
- genetic data, biometric data processed solely to identify a human being;
- health-related data;
- data concerning a person's sex life or sexual orientation.

**GEAM collects sensitive personal data!!  
Survey admins double check national legislation!!**

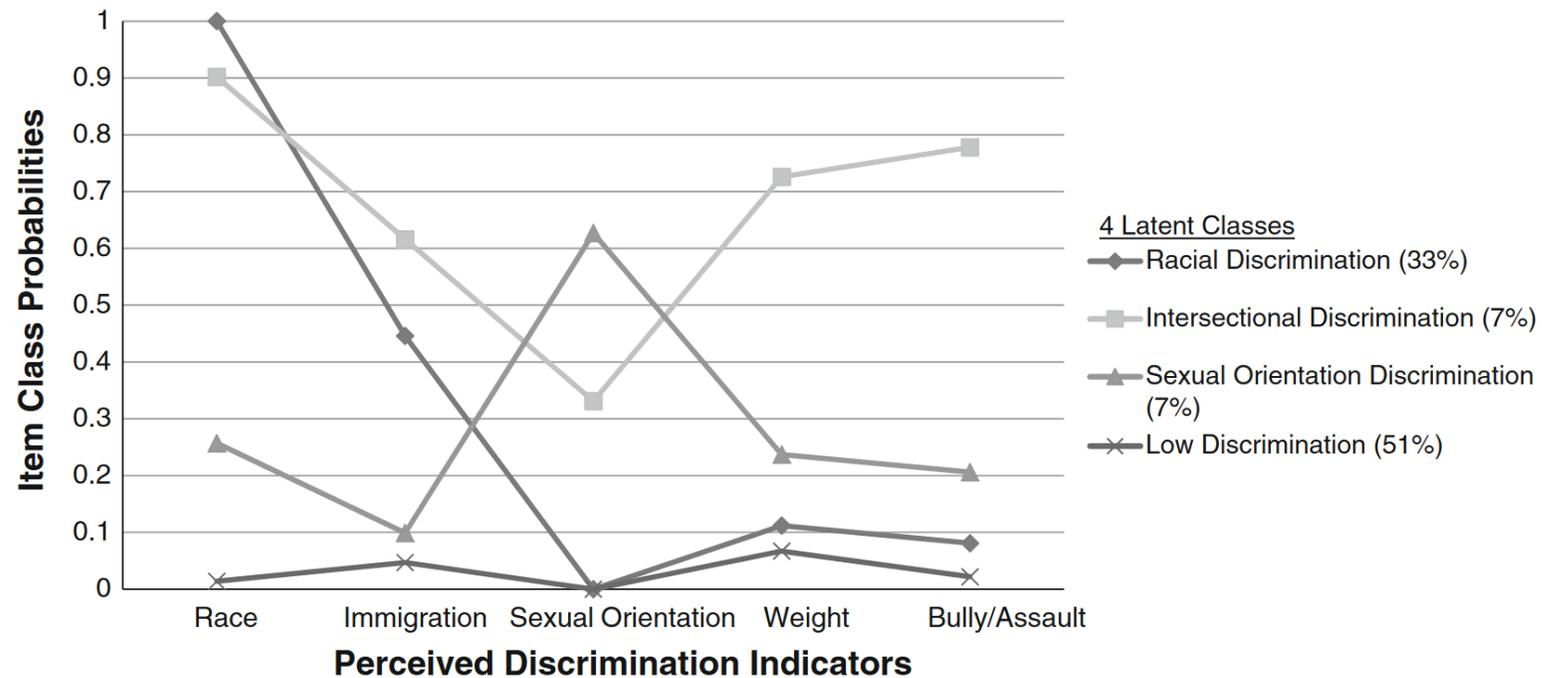
## According to Article 9(2) GDPR, the collection of sensitive personal data is prohibited, unless:

- Data subject has given **explicit consent**
- Processing is necessary for reasons of substantial **public interest**, on the basis of EU or national law;
- processing is necessary for: (i) achieving purposes in the public interest; (ii) the purposes of scientific or historical research; or (iii) statistical purposes.
- Data collection should serve a **well-define goal and purpose**, be **limited** to the necessary.
- Data collection/processing should not interfere with **interests, rights, and freedoms** at stake

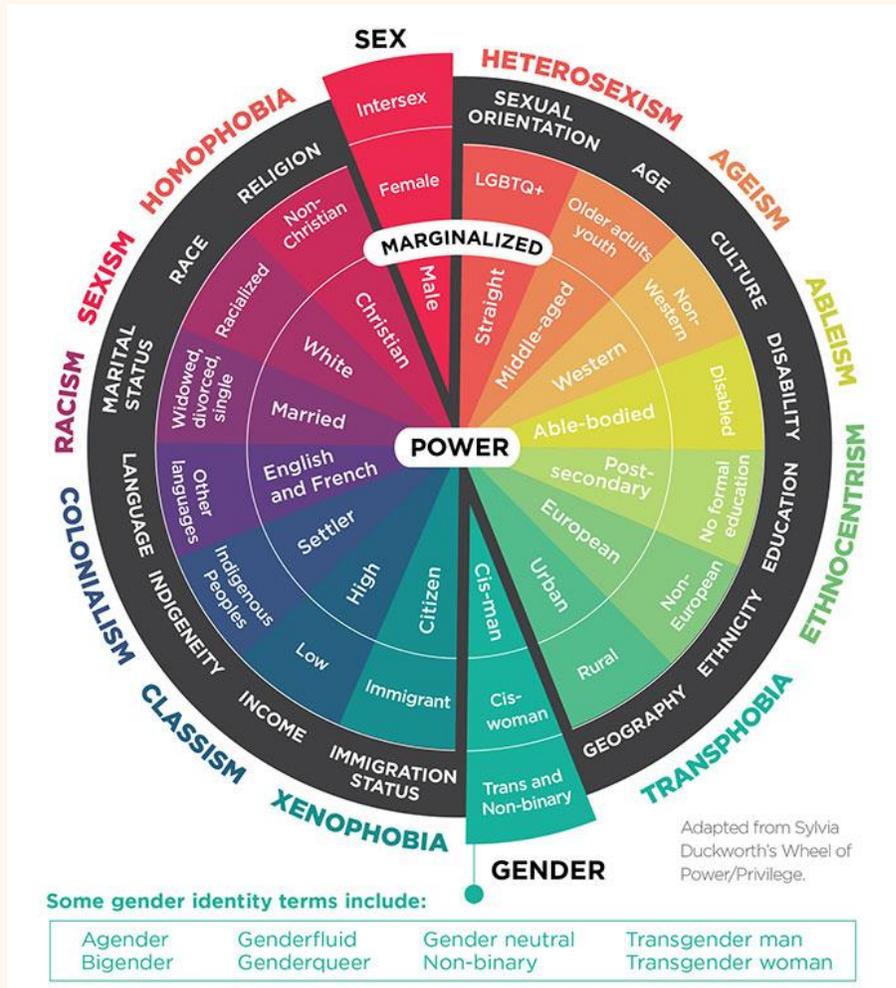
# What is Intersectionality?

Garnett, B. R., et al (2014). **The Intersectionality of Discrimination Attributes and Bullying Among Youth: An Applied Latent Class Analysis.** *Journal of Youth and Adolescence*, 43(8), 1225–1239.

<https://doi.org/10.1007/s10964-013-0073-8>

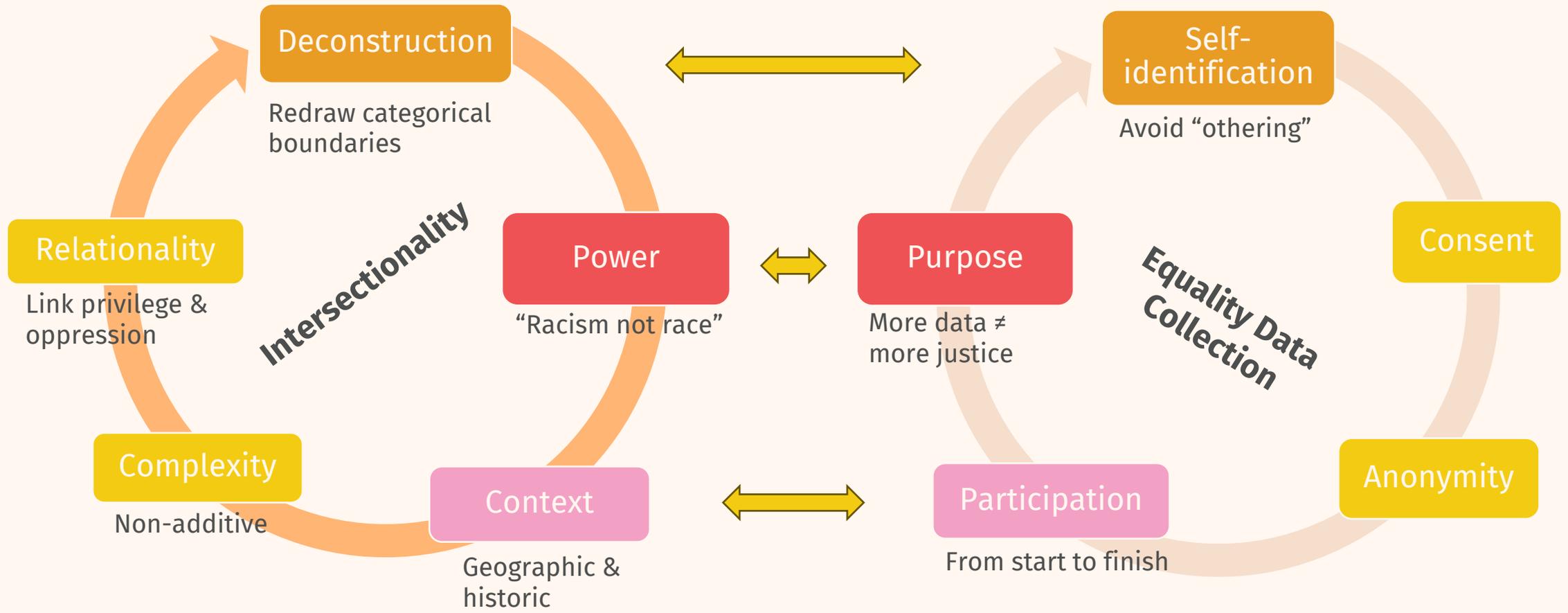


# Intersectionality – Critical Dimensions



- Coined by Kimberlé Crenshaw 1989 to show how Black women encounter **combined race and gender** (labour) **discrimination** – while no legal protection for this “new class of minority” group existed.
- **Critical perspective:** how power shapes experience, knowledge, thought.
- Intersectionality focuses on the **lived experience** of individuals
- Individuals have multiple and intertwined social identities, inhabiting **variety of positions of privilege and disadvantage** at the same time

# Intersectionality + Equality Data Collection



# Using GEAM for intersectional approach

## Research question and design

Traditional: “Which forms of gender-based violence do women experience most **compared to men?**”

vs.

Intersectional **between-group design**: “Which forms of gender-based violence do women experience most compared to men but also **compared to other women** that are older/younger, disability, straight/lesbian, etc.”

## GEAM components

Gender-based violence items: ask about specific incidents of microaggressions, bullying, sexual harassment experiences

+

Socio-demographics: Gender, age, disability/health conditions, sexual orientation, etc.

## Descriptive statistics

Mean values of junior women vs. senior women, disabled women vs. non-disabled, etc.

## Advanced analytical techniques

Multilevel intersectional modelling  
Latent Class Analysis

# Measuring Equality

*Basic quality criteria for measurement of social phenomena*

## **Objectivity**

Same data  
independently of who  
measures

Unbiased

## **Validity**

Indicator measure the  
phenomenon of interest

Implies a theoretical  
argument how a social  
phenomenon is conceived  
and manifest

Convergent vs.  
discriminant validity

## **Reliability**

Stability: similar results  
over repeated  
measures → key for  
documenting change.

Internal reliability:  
coherence of multi-  
item indicators  
(Cronbach's alpha)

# Example: Work–Family Conflict Scale

Question Item	Dimension
I have come home from work too tired to do the chores which need to be done.	Work interferes with family
It has been difficult for me to fulfill my family responsibilities because of the amount of time I spent on my job.	Work interferes with family
I have arrived at work too tired to function well because of the household work I had done.	Family interferes with work
I have found it difficult to concentrate at work because of my family responsibilities.	Family interferes with work

Internal validity: Cronbach's alpha across countries (min: .65, max: .85)

Correlations with: Gender, Age, Household hours, Working hours, Health, Happiness.

Breyer, B., and M. Bluemke. 2016. "Work-Family Conflict Scale (ISSP)." ZIS - The Collection Items and Scales for the Social Sciences. <https://doi.org/10.6102/zis243>

3

Hands-on training

# *Preparing for Session II*

## **Purpose of hands-on training session**

- Familiarize yourself with the LimeSurvey platform
- Adjusting global settings (language, title, welcome message, data protection)
- Understanding questionnaire structure
- Modifying questionnaire content
- Launch settings

Only 20 GEAM practice accounts available

- Prioritize more immediate needs (launch within next 3 months)
- Participants with no previous experience

## **How/what to prepare?**

Think carefully about the information/data needs of your organization regarding the implementation of Gender Equality Plans.

Review content of online GEAM and try to respond to the following questions:

- What is and what is not covered by the GEAM?
- What needs to be added?
- What needs to be adapted/changed?

# Friday 31<sup>st</sup> of May

## 14:00-17:00



TIME	CONTENT
14:00-14:30	Introduction and welcome
14:30-15:00	Screencast I LimeSurvey + adapting global GEAM settings
15:00-15:30	Hands-on practice I
15:30-15:45	BREAK
15:45-16:15	Screencast II Modifying GEAM content
16:15-16:45	Hands-on practice II
16:45 - 17:00	Next steps: launch

*Thank you!*

**Jörg Müller**

[jmuller@uoc.edu](mailto:jmuller@uoc.edu)

<https://www.inspirequality.eu/>

<https://www.gender-ict.net>



# References



- Aldercotte, A., Caprile, M., Guyan, K., Malibha-Pinchbeck, M., Müller, J., Palmén, R., & Startin, C. (2021). *ACT - Gender Equality Audit and Monitoring (GEAM)—Version 2*. Zenodo. <https://doi.org/10.5281/zenodo.5348197>
- Bauer, G. R., Churchill, S. M., Mahendran, M., Walwyn, C., Lizotte, D., & Villa-Rueda, A. A. (2021). Intersectionality in quantitative research: A systematic review of its emergence and applications of theory and methods. *SSM - Population Health*, *14*, 100798. <https://doi.org/10.1016/j.ssmph.2021.100798>
- Beeckmans, J., Zaroni, P., & Van Laer, K. (2023). *Intersectional policies in Higher Education and Research: A scoping literature review* [Deliverable 2.1 INSPIRE Project]. INSPIRE Centre of Excellence. <https://zenodo.org/records/10033571>
- British Columbia's Office of the Human Rights Commissioner. (2020). *Disaggregated demographic data collection in British Columbia: The grandmother perspective*. Office of the Human Rights Commissioner. [https://bchumanrights.ca/wp-content/uploads/BCOHRC\\_Sept2020\\_Disaggregated-Data-Report\\_FINAL.pdf](https://bchumanrights.ca/wp-content/uploads/BCOHRC_Sept2020_Disaggregated-Data-Report_FINAL.pdf)
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