

InGEPaST project

“The Intersection of Gender and Ethnicity in Socio-Economic Participation in South Tyrol and Catalonia in Post-Pandemic Times”

WP1 – Deliverable D.1.2
“Short report on fine-tuned methodology”
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Contents

1	Project abstract.....	3
2	Project research questions	3
3	The methodological approach	4
	3.1 Introduction	4
	3.2 Foundational elements of the methodological approach	5
4	Project research (flexible and non-experimental) design	8
5	Research techniques and sampling strategy	10
6	Ethical issues.....	12
7	References	13

1 Project abstract

The InGEPaST project aims to explore the intersection of gender and ethnicity vis-à-vis socioeconomic participation in two substate units that share similar autonomous settings and societal challenges (South Tyrol and Catalonia) to provide innovative solutions for enhancing the access to employment, education, and social and public services of women and LGBTIAQ+ (lesbian, gay, bisexual, transgender, gender diverse, intersex, asexual, queer and questioning) individuals in a post-pandemic scenario.

InGEPaST's main hypothesis is that the adverse effects of the intersection of gender and ethnicity (particularly, in terms of socioeconomic participation, i.e., access to employment, education, and social and public services) have recently worsened vis-à-vis women and LGBTIAQ+ individuals due to both the pandemic and the precautionary safety measures (e.g., lockdowns, homeschooling, prohibition of gatherings) also in rich areas such as South Tyrol. Therefore, there is a need to understand how this intersection operates and relates also with other social drivers (i.e., social conditions and factors; e.g., age, class, domestic division of labor, degree of agency, religion, stereotypes, urban-rural reality, violence).

InGEPaST adopts an interdisciplinary socio-legal approach and a qualitative methodology. It thus works with the real-world gender policies' stakeholders (women and LGBTIAQ+ individuals and their associations) as well as local policymakers by conducting empirical research in both South Tyrol and Catalonia. Its outputs include not only solid scientific results but also a set of policy indications in the field of socioeconomic participation in South Tyrol.

InGEPaST proposes an applied research approach that innovatively bridges three areas of study (gender, minorities/stateless nations, and migration) that, with few exceptions, have been traditionally tackled separately. Moreover, it applies the lens of intersectionality to capture the layers of stratified discrimination that women and LGBTIAQ+ individuals may suffer from vis-à-vis their socioeconomic participation. In Europe, studies on intersectionality have mostly addressed the intersection of gender and work with regard to women and migration only, and, so far, little attention has been dedicated to the intersection of gender, ethnicity and work of LGBTIAQ+ individuals.

InGEPaST positions itself in these scholarly lacunae and serves also as a socio-legal research vehicle to assess and promote the local application of the Sustainable Development Goals (SDGs) nos. 5 (gender equality), 8 (decent work and economic growth), 10 (reduced inequalities), and 16 (peace, justice and strong institutions) and of the three principles of universal values (human rights-based approach; leave no one behind; gender equality and women's empowerment).

2 Project research questions

InGEPaST pursues the following (fine-tuned) research question (RQ): how do gender and ethnicity intersect vis-à-vis socioeconomic participation (i.e., access to employment, education and social and public services) of women and LGBTIAQ+ individuals in South Tyrol and Catalonia in light of the SDGs (nos. 5, 8, 10, and 16) and the three principles of universal values (human rights-based approach; leave no one behind; gender equality and women's empowerment)?

This RQ is further articulated into the following (fine-tuned) research sub-questions (SRQs):

1. What are the main social drivers that influence the intersection of gender and ethnicity in the socioeconomic participation of women and LGBTIAQ+ individuals in South Tyrol and Catalonia? How do they correlate, operate and differentiate?
2. What are the pros and cons of the existing (pre-pandemic) South Tyrolean and Catalan policies toward gender and ethnic socioeconomic participation? Should they be reshaped, and, if so, how?
3. How can the substate application of recovery policies or other substate/local policies and instruments promote socioeconomic participation of women and LGBTIAQ+ individuals in a post-pandemic scenario in South Tyrol and Catalonia, also in light of the SDGs (nos. 5, 8, 10, and 16) and the three principles?

3 The methodological approach

3.1 Introduction

InGEPaST's research questions and how they are formulated lead to an interdisciplinary socio-legal approach and a qualitative methodology. More specifically, by applying and building upon the legal theory of intersectionality and adhering to poststructuralist/postmodern feminist and queer theories (see further below), InGEPaST bridges the social sciences (interpretative) qualitative approach that collects and analyzes individual perceptions (Robson & McCartan 2016: 20, 24-25) with the legal qualitative methodology that analyses the "real-world" level of application and impact of legal instruments (e.g., policies) upon specific sectors of the society (Dobinson & Johns 2014: 19-21). InGEPaST pursues such an approach because it aims to collect and study individual perceptions and contrasts them with the existing policies to provide innovative solutions for a post-pandemic scenario vis-à-vis socioeconomic participation of women and LGBTIAQ+ individuals in South Tyrol and Catalonia. While a quantitative approach may also serve to collect (measured) perceptions (e.g., based on a questionnaire with Likert scales' answers), a qualitative approach allows for not only an in-depth analysis of such perceptions but also a higher degree of flexibility and fluidity that the quantitative approach tend to lack (Robson & McCartan 2016: 18) and that in InGEPaST will allow to better identify the additional social factors that correlate, operate and differentiate within the intersection of gender and ethnicity.

3.2 Foundational elements of the methodological approach



Figure 1: The methodological approach of InGEPaST (own elaboration)

InGEPaST, as mentioned, is an **interdisciplinary socio-legal** research project and adopts a qualitative approach. Moreover, it is an **applied research project** that embraces what Robson & McCartan (2016) calls the “**real world**” perspective. This is because InGEPaST focuses on the *real* social-life (and related policies) and tries to understand those lived experiences and problems and the complexities lying behind them (Robson & McCartan 2016: 3-4) that are faced by few of those sectors of the society (i.e., women, LGBTIAQ+ individuals, migrants, ethnic minorities) that are more discriminated against and have suffered more adverse effects by the pandemic than others. This project also aims to provide informed evidence to policy and practice and thus have an impact on society (Robson & McCartan 2016: 10-11; Letherby 2020: 73). While InGEPaST’s main outcome is voicing the main hurdles and types of discrimination that women and LGBTIAQ+ individuals in South Tyrol and Catalonia face with regard to their access to employment, education, and social and public services, its impact consists in prompting the reflection upon the adoption of effective and data-driven socioeconomic policies vis-à-vis these sectors of the society in these two substate entities, also as a local vehicle to realize SDGs nos. 5, 8, 10 and 16 and the three principles of universal values.

By focusing on real-life experiences, InGEPaST’s nature is thus **empirical**. InGEPaST is also **exploratory** because it aims to understand how the intersection of gender and ethnicity *operates* (and, as mentioned, relates to other social drivers) vis-à-vis the socioeconomic participation (i.e., access to employment, education, and social and public services) of women and LGBTIAQ+ individuals in South Tyrol and Catalunya but it does not aim to produce definitive conclusions on these issues. Indeed, it provides valuable scientific results and data-driven policy indications but also serves as a platform for future research in these fields.

InGEPaST does not totally adhere to the participatory (action) research approach because it does not involve the respondents in the design of, e.g., the overall goal, the research questions, et al. (Robson & McCartan 2016: 199-201). However, InGEPaST may be described as “**quasi-participative**” because it does consider the participants (informants/respondents) as *subjects* and not objects of the research and involves them in the identification of those social drivers that correlate, operate, and differentiate with the intersection of gender and ethnicity in South Tyrol and Catalonia. Future research may, indeed, be framed as critical (and participatory) action research, that is the type of research that is critical of social processes, looks for improvements, and involves participants since the project’s design and in all its stages (Robson & McCartan 2016: 199-201; Letherby 2020: 73).

Last, but surely not the least, InGEPaST pursues a **gender-sensitive approach**, that is, it considers gender as a central part of not only its research foci and all aspects of the social life it investigates but also of the relationship between the researcher and the researched (Letherby 2020: 59-60; see also below). It also includes the intention to lead to a change to transform the current (sexist and/or based on the presumption of the superiority of heteronormativity) society (Letherby 2020: 59; Curriel 2013: 56).

At the same time, this approach contributes to consider gender as a fluid and plural concept in terms of *gender pluralism*, i.e., a continuum without binary boundaries in line with the poststructuralist/postmodern feminist and queer debates (Richardson 2020: 14 and 19). In particular, InGEPaST assumes that gender is a social (and legal) construction although it acknowledges that the categories that are defined therein (e.g., “women” or the label “LGBTIAQ+”) are not only imposed and/or used by, e.g., policymakers or legal practitioners, but also employed by the very same actors that, e.g., advocate for their rights (e.g., feminist and/or LGBTIAQ+ civil society organizations). At the same time, InGEPaST acknowledges that “subjects are contextualized, allowing the process of resignification to take place from excluded spaces and epistemologies, thus altering the relations of domination built on gender, race and sexuality, amongst others” and that “[i]dentity - also sexual or gender identity - is the result of a process in constant construction” (Merino-Sancho 2020: 257).

Likewise, the other key concept of this project, i.e., “**ethnicity**”, is also considered as a socio-legal construction and a fluid, plural, provisional and situated concept that rejects essentialism and takes into due consideration the internal diversity of (potential) “ethnic groups” and how they change, evolve and

mix (Meer 2014: 42). At the same time, elaborating on Modood's (2005) indications (as cited by Meer 2014: 41-42), in InGEPaST the term "ethnicity" may include self-identification along public articulations of a linguistic community or territory, real or imagined descentance, religion or other factors that have a subjective power; the disproportional attribution of given socioeconomic characteristics; the ways of living; the strategic mobilizations some (created) groups adopt; and/or cultural distinctiveness, e.g., in norms and practices or others.

Finally, few premises need to be done regarding InGEPaST **researcher's stance**, i.e., myself and my approach, position, and epistemology. I am conscious I am a white middle-class (female) researcher who has been brought up in accordance with Western values. In the past, I had the fortune to work extensively with people in vulnerable situations (e.g., marginalized Indigenous communities), in a variety of contexts (e.g., both in rich and poor households and/or neighborhoods) and in different countries (both in Europe and overseas). These field experiences have taught me to be reflective, respectful, and humble, and how to engage with the respondents with empathy but avoiding emotional risks.¹ I always try to be a reflective and careful researcher. In InGEPaST, I will keep this attitude, which also helps me to find a balance in the power relation and dynamics between myself (the researcher) and the researched (Letherby 2020: 70-71). Likewise, I am conscious of the subjective influence in the researcher-researched relationship, but I will duly conduct my research with scientific rigor to offer an honest "accountable knowledge" that provides "useful data", that is, the knowledge that is needed to *understand* the data but not control them (Letherby 2020: 71-72). This is also in line with Haraway's "situated knowledge" as feminist objectivity (1988: 581), that "allows [...] [feminist researchers] to become answerable for what we learn to see" (Haraway 1988: 583).

¹ On the need to be humble and reflective and to avoid emotional risks see Robson & McCartan (2016: 4) and Letherby (2020: 60, 68-69 and 71-72).

4 Project research (flexible and non-experimental) design

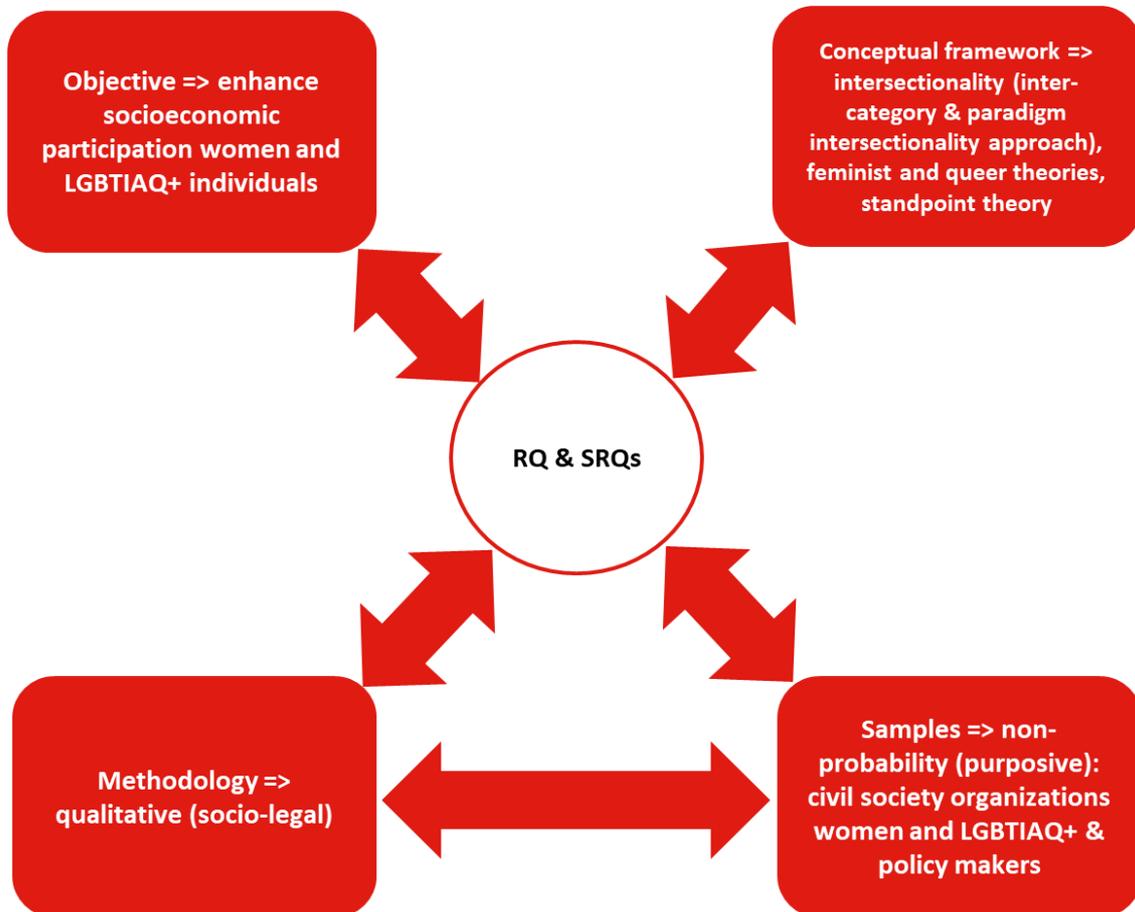


Figure 2: InGEPaST research design (own elaboration)

The (current) research design of InGEPaST, which, as mentioned, adopts an interdisciplinary **socio-legal qualitative methodology**, is **flexible**. This is because its data do not consist in numbers but in “words” and few details may change and/or evolve over time in accordance with the empirical work (Robson & McCartan 2016: 76). Moreover, this flexible design marries with the purpose of focusing on the participants’ (informants’/respondents’) views and my above-mentioned researcher’s attitude (Robson & McCartan 2016: 148). InGEPaST is **non-experimental** because it does not aim to study a resultant change and contrast or compare different groups of (human) respondents’ opinions, attitudes, etc. but to collect the different perceptions and thematically analyse them (Robson & McCartan 2016: 79; see also section 5). In this frame, InGEPaST follows the case study design tradition since it conducts empirical research on current, real-life social issues that regards two substate entities, i.e., South Tyrol and Catalonia. Moreover, it uses the type of case study that may be defined as “community studies”, that is, the analysis of the patterns, relations, and other aspects of community life (Robson & McCartan 2016: 153).

In the (current) research design of InGEPaST the **RQ** and **SRQs** sit at the core of the project and feed and have a mutual relation with the project **objective** and **conceptual framework**. The former, as mentioned in section 1, is to enhance the access to employment, education, and social and public services of women and LGBTIAQ+ in South Tyrol and Catalonia. The latter regards my theory “of what is going on” and “why” (Robson & McCartan 2016: 72), that is, that the pandemic and the precautionary safety measures have worsened the socioeconomic participation of women and LGBTIAQ+ also in rich areas such as South Tyrol and Catalonia because of the intersection of gender and ethnicity and the correlation with other social drivers. Hence, InGEPaST builds upon the theory of **intersectionality** (Crenshaw 1989 and 1991; Collins 1990) since this theory allows to explore how different factors operate and shape multiple forms of social inequalities. Intersectionality also points at how such multiple forms of social inequalities shall be analyzed as a critical matrix to understand how they both mutually reinforce and raise different and complex problems in the real-life of those persons that may situate at the nexus, e.g., of gender, ethnicity, age, disability or class (Pilcher & Whelehan 2017: 83). At the same time, InGEPaST adopts the “**intercategorical**” approach of intersectionality of McCall (2005: 1784-85), that uses social categories but in a critical way and only to the extent which it allows to explore how inequalities exist between and across (social) groups and thus make comparison among them. Moreover, InGEPaST adheres to the “**paradigm intersectionality approach**” proposed by Hancock (2019: 118) to empirically analyze the complex causalities of specific social inequalities and, at the same time, suggest ideas to transform the legal institutions, which, in InGEPaST, are the socioeconomic policies vis-à-vis women and LGBTIAQ+ in South Tyrol and Catalonia. In this frame, InGEPaST thus looks at how gender and ethnicity create a critical matrix together with other social factors and how they potentially lead to social inequalities vis-à-vis the socioeconomic participation of women and LGBTIAQ+ in these two substate units. In addition, InGEPaST explores how these social inequalities may be addressed by policymakers to achieve the abovementioned project aim to enhance the access to employment, education, and social and public services of women and LGBTIAQ+ in South Tyrol and Catalonia.

Furthermore, as mentioned, InGEPaST aligns with **poststructuralist/postmodern feminist and queer theories** insofar as it considers gender as a fluid concept and a continuum, and with the (feminist) **standpoint theory** that acknowledges that the perspective of the less privileged are likely to be more veritable and thus the research be more self-critical and coherent than that research that claims to be totally objective and neutral but are permeated by androcentrism and/or (hetero)sexism (Harding 1991: 121, 138 and 141). Likewise, I am also conscious that the “standpoints of the subjugated are not ‘innocent’ positions” (Haraway 1988: 584) and that I need to “learn how to see faithfully from another’s point of view” (Haraway 1988: 583).

Finally, InGEPaST’s RQs and SRQs and its (socio-legal) qualitative methodology imply a **non-probability (purposive) sampling strategy** that include women and LGBTIAQ+ civil society organizations and policy makers as it will be discussed below (section 5).

5 Research techniques and sampling strategy

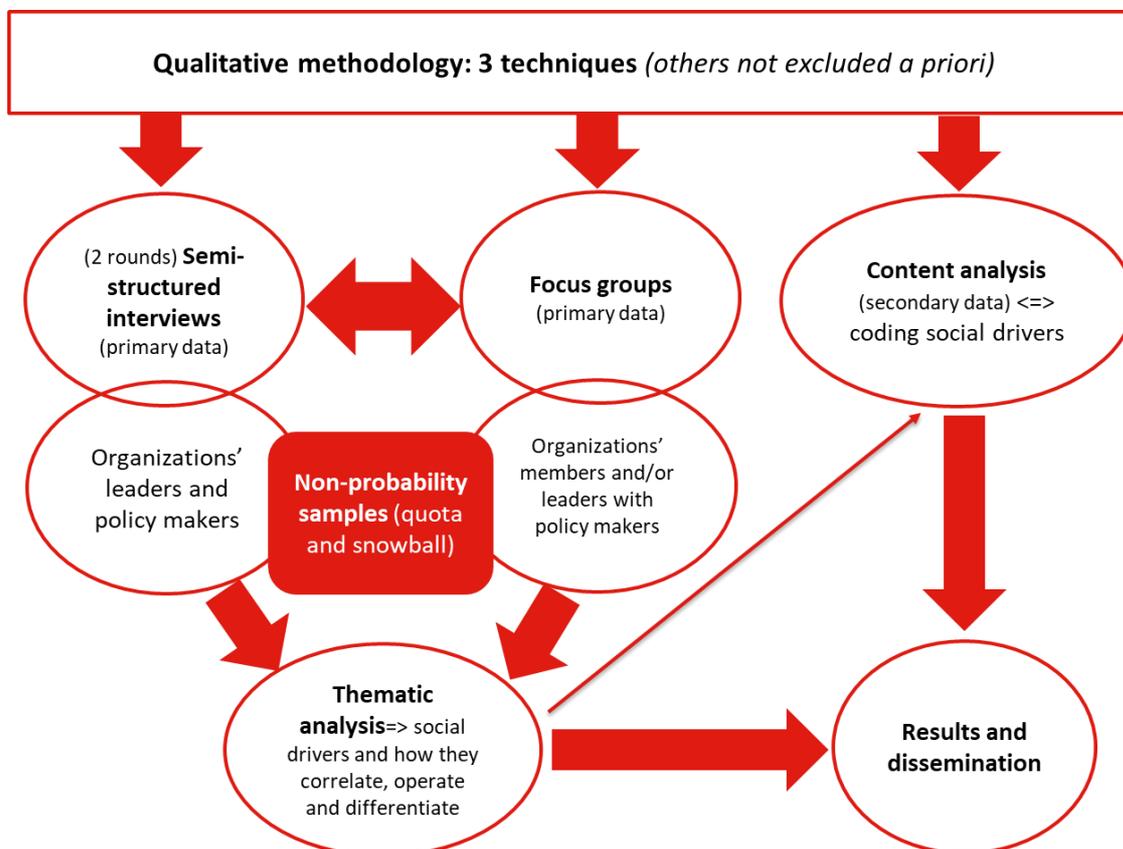


Figure 3: InGEPaST research techniques (own elaboration)

InGEPaST adopts three main qualitative research techniques: semi-structured interviews, focus groups, and content analysis. Therefore, InGEPaST uses two types of data: primary data that are generated from the semi-structured interviews and the focus groups, and secondary data, that are, scholarly articles of the project literature review, and the substate South Tyrolean and Catalan pre-pandemic and recovery policies and other instruments that deal with the socioeconomic participation, i.e., access to employment, education, and social and public services, of women and LGBTIAQ+ individuals.²

More specifically, to reply to research sub-question no.1, approx. 60 qualitative semi-structured interviews and 4 focus groups³ are to be conducted with women and LGBTIAQ+ associations/civil society organizations and their members in South Tyrol and Catalonia, possibly both in rural and urban settings and including both locals and migrants or one or the other, against some initial preidentified correlated social drivers of the intersection of gender and ethnicity (e.g., age, class, domestic division of labor, degree of agency, religion, stereotypes, urban-rural reality, violence, etc.). The field notes and the transcribed texts of the interviews and the focus groups are then to be thematically analyzed with the

² InGEPaST research data and how they are managed are specified in deliverable no. 1.1 (WP1) "Research Data Management Plan", doi: 10.5281/zenodo.6531621.

³ The number of interviews and focus groups may vary if participants (informants/respondents) are reticent to be interviewed or, vice versa, they provide other contacts that may serve as participants too (see infra). Alternatively, if the number of interviews reduces, the number of focus groups will be increased. This has to be reevaluated in due time.

support of the software NVivo, which Eurac has a license of, with the main goal to identify other or new drivers that may emerge from the collected perceptions. To this aim, first, I will (manually) code the notes and the transcriptions in NVivo. The codes will be mainly assigned according to the schedules of the interviews and the focus groups and to other recurrent themes that refer to the intersection of gender and ethnicity and the additional social factors that correlate, operate and differentiate within such intersection. The number of codes will be concise to avoid the so-called “coding-trap”, and some codes may be grouped into codes’ families. Second, I will analyze how and how often the themes are dealt with and reported by the participants (informants/respondents) by noting patterns, themes, and trends, and setting plausibility. Third, I will discuss and report the findings to the scientific community in academic conferences, papers and articles and to the wider public through transfer-oriented publications.

Once clarified what are the main drivers in accordance with the participants (interviewees and the focus groups’ informants/respondents), there is a need to understand if and how the existing (pre-pandemic) or other South Tyrolean and Catalan policies towards socio-economic participation of women and LGBTIAQ+ policies address them, and, if not, how they could be reshaped (research sub-question no.2). This is to be tackled through the research technique of content analysis on secondary data with the support of the software NVivo. Once familiarized with the data, I will first construct categories for analysis (e.g., on the values and the goals of the policies) and code them. Second, I will test the coding on samples of text and assess reliability. Third, I will finally carry out the analysis by contrasting the content of the policies with the main (and those additional) social drivers that correlate, operate and differentiate with the intersection of gender and ethnicity and that were identified by the participants (interviewees and the focus groups’ informants/respondents).

Similarly, to reply to research sub-question no.3, content analysis (again, with the support of the software NVivo) is to be conducted on the subnational application of recovery policies or other substate/local policies and instruments to explore how they address socioeconomic participation of women and LGBTIAQ+ in a (potential) post-pandemic scenario in South Tyrol and Catalonia and in light of SDGs nos. 5, 8, 10 and 16. How such socio-economic participation may be enhanced, however, require further, ad hoc semi-structured qualitative interviews and/or focus groups with both women and LGBTIAQ+ associations’ leaders as well as South Tyrolean and Catalan policymakers to further collect their perceptions and suggestions.

In sum, InGEPaST foresees to use three main qualitative research techniques by carrying out two rounds of semi-structured qualitative interviews and one round of (two or more) focus groups for each South Tyrol and Catalonia (that will produce the primary data), and two content analyses (on secondary data). Other qualitative research approaches are not excluded *a priori* and may be applied following the empirical research.

As to the sampling strategy, InGEPaST employs a non-probability (or purposive) sample (Robson & McCartan 2016: 279). In particular, it uses the quota sampling (Robson & McCartan 2016: 280) insofar as it tries to reach out representatives of a high number of women and LGBTIAQ+ associations/civil society organizations and local policymakers in relative proportions in both South Tyrol and Catalonia. The aim is to offer results that, albeit won’t be statistically representative, will anyhow offer an indication of the real-life experiences of women and LGBTIAQ+ vis-à-vis their access to employment, education, and social and public services in these two substate entities. InGEPaST may also employ the snowball sampling (Robson & McCartan 2016: 281) insofar as some of the respondents that will be identified in accordance with quota sampling may indicate other associations/civil society organizations and local policymakers to contact and serve as respondents as well.

6 Ethical issues

InGEPaST touches upon two social (constructed) concepts and realities that are extremely sensitive, i.e., gender and ethnicity, as well as other social drivers, such as age or domestic violence, that imply a high level of sensitiveness. It does involve human participants (informants/respondents) that may self-identify and/or be socially or legally ascribed in one of these (fluid and plural) categories and/or others (e.g., LGBTIAQ+, migrants) and thus provide me with personal and sensitive data.

Therefore, I plan not only to keep a reflective, respectful, and humble attitude as specified above (see section 3.2) but also to completely adhere and apply the [Eurac Research Core Ethics and Integrity Principles](#), which reflect the responsible social research practices that have (or should have) now become a common standard in academia. In particular, I will follow the principles of respect, honesty, rigor, transparency, openness, and accountability and plan and manage potential research risks; respect national, European, and international law, as well as established scientific principles and disciplinary norms in research practices and data collection; present the research results timely and in a responsible manner; interpret research results rigorously; whenever possible, publish research data and preserve them to allow re-use in the future in line with the [FAIR principles](#);⁴ invite human participants to participate on a voluntarily basis to contribute with information about their persons, habits, actions, and/or opinions; plan the research in a way that does not harm the safety, dignity, and privacy of any human participants; provide the (human) participants with all the legal and ethical aspects and the information about the research project in advance and with consideration; ask the (human) participants for the consent to participate that has to be expressed in written by informing them, at the same time, about their right to withdraw from the research.

In this frame, each (human) participant will duly receive an information notice on InGEPaST that contains details about the project and its methodology, research techniques and results, and on the data protection and privacy and the processing of the participant's personal data in accordance with EU Regulation 2016/679 (GDPR), incl., art. 9 on special categories of personal data (such as those on ethnic origins). This information notice also includes the consent forms to participate voluntarily in the project, the right to withdraw from the project and revoke the consent, to the processing of the personal data (including, special categories such as those on the ethnic origins), and to allow the researcher (myself) to take video and sound recordings (when applicable) for transcript purposes. The information notice and the consent forms are elaborated in cooperation with Eurac Legal Office that ensures the respect of all national, European, and international laws. As principal investigator/researcher of InGEPaST, I am responsible to hand in such information notice and collect signed consent forms from each participant before involving them in any project activity.

⁴ Further details on the management of research data may be found in InGEPaST's deliverable no. 1.1 (WP1) "Research Data Management Plan", doi: 10.5281/zenodo.6531621.

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