



# **Equality, Diversity and Inclusion at Work**

A RESEARCH COMPANION



EDITED BY

**Mustafa F. Özbilgin**

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A Research Companion

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*Edited by*

Mustafa F. Özbilgin

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East Anglia, UK*

**Edward Elgar**

Cheltenham, UK • Northampton, MA, USA

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Published by  
Edward Elgar Publishing Limited  
The Lypiatts  
15 Lansdown Road  
Cheltenham  
Glos GL50 2JA  
UK

Edward Elgar Publishing, Inc.  
William Pratt House  
9 Dewey Court  
Northampton  
Massachusetts 01060  
USA

A catalogue record for this book  
is available from the British Library

Library of Congress Control Number: 2009925912



**PEFC**<sup>™</sup>  
PEFC/16-33-111

CATG-PEFC-052  
[www.pefc.org](http://www.pefc.org)

ISBN 978 1 84720 335 9

Printed and bound by MPG Books Group, UK

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# Equality, diversity and inclusion at work: yesterday, today and tomorrow

**Mustafa F. Özbilgin**

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## INTRODUCTION

Centuries of human rights activism and decades of political, demographic and social changes have been driving the agenda for equality, diversity and inclusion (EDI) in the world of work. This long period of transformation has witnessed substantial progress as traditionally excluded and marginalised groups made inroads into the fields of education and employment, from which they were previously excluded. In many industrialised countries, these positive changes in access to education and work have led recent generations of young women and men to feel that equality of opportunity has been largely achieved. Consequently, cohorts of students in higher education believe that their prospects of work and employment are without bias or prejudice. Some students find discussions of inequality and discrimination as irrelevant to their career plans. Unfortunately, much of this optimism is misguided. Despite a long history of progress towards EDI at work, multiple forms of inequality, discrimination and exclusion continue to mark the experience of individuals across their life course.

This edited volume consisting of an introduction and 31 contributed chapters is a collective attempt at examining the continued relevance of studying EDI at work. In this introductory chapter, I first define the EDI field at work. The chapter goes on to outline some salient frameworks for studying EDI across time and space. Then I explain the rationale for the volume, its structure as well as an overview of each chapter.

## FRAMING EQUALITY, DIVERSITY AND INCLUSION AT WORK

Amartya Sen (1995) explains that the richness of human diversity and availability of a wide array of criteria against which equality of opportunities,

entitlements and outcomes are judged, require us to develop robust and sophisticated ways to explore EDI at work. Due to the relevance of EDI to all domains of social, economic and political life and scholarship, there are a myriad of complex ways in which EDI may be practised and theorized at work. In this volume we examine the complex nature of EDI in the world of work through interdisciplinary, comparative and critical perspectives. The volume is interdisciplinary as contributors bring insights from across disciplines of social sciences and humanities. Second, it provides a comparative perspective as many of the chapters provide cross-national and multidimensional insights through comparative analysis. Third, it is critical as it focuses on structures of inequality in relations of power in exploring issues of EDI at work.

The terms, 'equality, diversity and inclusion' were chosen specifically to delineate the conceptual frame of the volume. Each of these terms adds a different and unique dimension to the study of relations of power at work. While the term 'equality' allows for a comparative reading of relations of power in the workplace, the term 'diversity' draws attention to the multiplicity of strands of difference and the term 'inclusion' adds a purposive and strategic dimension to the investigation of interventions to relations of power at work. These subtle differences aside, equality, diversity and inclusion are also used in interrelated ways, reflecting their interconnectedness at the level of theorisation and practice.

I shall now address the temporal and spatial dimensions of the study of EDI at work. These two dimensions are important in understanding how EDI at work can be realistically framed. I describe the significance of reflecting on time and place in understanding EDI, and provide an assessment of limitations and pitfalls in subscribing to narrow conceptions of each dimension.

### **Importance of Time and the Tyranny of History**

Time is an important dimension for understanding equality. Although time may witness progress towards equality, it is debatable whether passage of time ensures greater EDI at work. Indeed, the field of EDI field does not present a trajectory of constant advancement but a fragmented picture of progress, stagnation and even retrenchment. Scholars who advocate voluntarism in terms of anti-discriminatory action as well as equality and diversity initiatives would like to make us believe that time alone, without any intervention, can provide greater levels of equality and inclusion. While certain forms of equality are achieved over time, others may prove resilient during the same period. New forms of inequality are also recognised in line with the development of social and economic morality.

Understanding EDI in the context of time and history permits us to see the real extent of change through transformation, backlash, atrophy and retrenchment as well as inertia in the form of resistance, conservatism and apathy. Historical analyses provide an understanding of dependencies in terms of resources, rules, and cultural and institutional arrangements, and render it possible for us to envisage more realistic trajectories of future change.

However, historical analyses may also ground our imaginations and demarcate our visions of a better and more egalitarian and inclusive future. Feminist and post-colonial critique of work has been marked with this pessimism, which is highly skilled in documenting discrimination and yet anaemic in terms of providing a vision for transformation and change. History, therefore, offers an important but at best inadequate resource for emancipation. It is the treatment of history, rather than the history itself that is important. Recognising history as a possibility, rather than destiny, is important for scholars in the field to understand and transcend the trajectories of inequality, discrimination and exclusion that history presents us. Thus, it may be possible to overcome the tyranny of history, which is littered with triumphs of justice in equal measure as episodes of injustice, only by drawing on the power of foresight.

### **Importance of Place and the Tyranny of Context**

Although the values of EDI are context specific, English language scholarship in this field has fairly recently begun to take an interest in countries outside the English-speaking world. Internationalisation of business, global acceptance and spread of business education in English as well as the development of strategies for global EDI management have brought cross-national variations in theorizing, legitimating and practising EDI. In recent years, we have seen publications of books and papers on country perspectives as well as cross-national, comparative and domestic aspects of EDI at work. All of these efforts herald the rise of context sensitivity in this field.

The contextual approach originally emerged as a reaction to the North American and British domination in theorisation, which failed to account for issues facing countries and regions with different sets of priorities, processes, institutions and traditions in terms of managing equality and diversity at work. We can now see that the contextual approach is well represented in scholarship and has gained an elevated status which almost defies criticism in the field. Indeed, rediscovery of the national context in relation to EDI at work sometimes leads to glorification of the context under study, with little attention paid to inequality,

discrimination and bias which may be inherent in that specific context. On the one hand, the contextual approach offers possibilities of enriching the repertoire of EDI at work and on the other, it may suffer from unique biases of its own.

While recognising the strengths of the contextual approach, I would like to draw attention to the tyrannical potential of this approach. First, the theory, practice and policy of equality, diversity and inclusion has never been limited to a single country. In the world of work, there has always been cross-border (cross-national, cross-sectoral) migration of ideas. The same is also true for EDI at work. Development of progressive practices at the national level has always benefited from international and cross-national influences. For example, the civil rights movement in France and the United States has fuelled civil rights movements in other countries. Similarly, inclusion of Northern European countries in the European Union has promoted the transposition of some progressive approaches to equal opportunities across the European Union. Therefore, international, cross-national and global influences partly account for progress in domestic-level policy and practice of equality. A contextual approach, which narrowly focuses on a single domestic context, may underplay the significance of migration of ideas and fail to consider the broader picture of dynamic international relations in exploring equality in domestic settings.

Second, framing context as destiny, rather than a possibility, may hinder innovative and progressive work in the field of equality. When contextual circumstances are described, there is often a tendency to consider that the processes which are unique to that specific context are relatively stable, fixed and resistant to change. The particular example of this is the women's rights issues in the Islamic countries of the Middle East. There is an essentialism associated with depictions of national cultures and regimes of gender segregation, which may indeed hinder and stunt the development of emancipatory movements as inequalities are legitimised through contextual formulations which consider context as destiny.

Finally, a contextual approach may prevent the study of silenced forms of inequality, discrimination and disadvantage. Cross-national and cross-cultural analysis can help us understand the social construction of relations of power across diverse groups, whereas a contextual approach which focuses on a single country may suffer from the adoption of dominant logics in exploring issues of equality. The danger then is that certain forms of inequality which are considered taboo, or which are marginalised through processes of political and economic domination, are rendered further invisible in narrowly framed contextual approaches which do not benefit from cross-fertilisation of ideas.

In order to transcend the dualism of contextual versus universalist

approaches to equality and diversity, I propose that context is framed as a possibility rather than a destiny; as a process of becoming rather than a state of being; as dynamically forming rather than fixed in time and place; and as a relational construct rather than an essential conception of social reality.

## EQUALITY, DIVERSITY AND INCLUSION: SCHOLARSHIP AND WORK

There is a Turkish proverb that roughly translates as ‘one mad person threw a pebble in a well and forty wise people could not take it out’.<sup>1</sup> The feeling associated with trying to understand the anatomy of equality and diversity resonates with the struggle of the forty proverbial wise people, who may need more than conceptual tools to achieve this. They also need material resources to achieve their goal. Similarly, understanding EDI scholarship and work requires us to understand symbolic and material resources and constraints of scholars and practitioners in the field.

Paulo Freire (1970) aptly noted that any social change project may suffer from the two ailments of either excessive reflection and little action (verbalism) or abundance of action in the absence of reflection (activism). Freire argued that it would be possible to place all social change programmes on a continuum of verbalism and activism. In the same vein, it is possible for us to look at EDI through this lens. In many fields of social science, there is an expectation that the scholars remain dispassionate about the subject which they are investigating. It is my belief that what motivates many scholars to enter the field of EDI defies this expectation of objective distance from the subject, as tackling injustice serves a significant motivation for engaged scholarship. The personal and political engagement of scholars in this field has been responsible for the work in this area to be characterised as emotive, rendering the work of scholars ineffectual by characterising them as either verbalism or activism.

As the domain of business and management operates largely with instrumental logics, the outcome was often the rejection of passionate and emotional scholarship which was considered irrelevant to business and management practice. Therefore, the transition from ‘equal opportunities’, which is linked to more emotive scholarship, to ‘diversity management’, which operates with instrumental logics of bottom-line business benefits, may be seen as an attempt by scholars to push equality issues into the mainstream of business and management, by removing its emotive and emancipatory content.

While academic struggles to reframe EDI are continuing, at the level



of practice understanding equality requires us to consider a wide range of factors including individual choices, chances (structural conditions), motivations, access to resources including education, skills, experience, financial, social, cultural and symbolic capital, as well as the strategies of EDI practitioners in negotiating their long- and short-term vision in the context of interpersonal, group level and macro-institutional arrangements.

Recent work (Özbilgin and Tatli, 2008) suggests that organisational support for EDI is an important but insufficient precondition for the effectiveness of interventions for change in this field. An organisational approach and the power and status of equality and diversity practitioners are also interlinked. Not all practitioners of EDI are offered similar levels of power and influence at work. They enjoy more power and influence in organisations which espouse more sophisticated approaches to equality and diversity that embrace legal, moral, social, business and economic arguments for equality and diversity, than organisations which subscribe to a narrow set of drivers for change and advocate more polarised conceptions of equality and diversity. Practitioners themselves can also make a difference. Those who are able to transcend the dichotomies, such as verbalism versus activism, business case versus legal case, individually based versus collectivist conceptions of diversity, and who can use more sophisticated and inclusive repertoires of equality and diversity, are often more effective in engaging significant organisational actors, and are better positioned to mobilise organisational resources for transformational change.

What appears in our efforts to understand equality and diversity as action is an overly complex picture, which evades linear logics. In order to develop a more realistic understanding of the role of agency, rules, resources and institutions in promoting EDI at work, we need to develop multilevel frameworks which can consider a complex set of factors at the macro-institutional, meso-relational and micro-individual levels. At the macro-institutional level reside the employment relations actors and institutions which regulate or liberate the relationship between organisations and interventions of equality and diversity. At the meso-level are the workplace relations, cultures and processes which shape the real and symbolic value of diversity and which determine the urgency for change towards equality, diversity or inclusion as well as the forms of resistance that diversity interventions may meet. At the micro-level are the efforts of the individual agents of change, which are negotiated through meso- and macro-level enablements and constraints of the particular field of equality and diversity. Multilayered analysis of EDI at work also requires attention to relationships of domination and subordination as well as inequities in distribution of power among actors and agents of change. I propose that

it would be possible to arrive at both a realistic and a critical conception of the field in this way.

## RATIONALE AND STRUCTURE OF THE VOLUME

This volume is an ambitious project. The original idea was to bring together chapters in which established scholars as well as novices of the field can reflect on their own contributions to the field of EDI, with a view to redress what Barack Hussein Obama calls ‘the moral deficit’, absence of EDI in our societies and in the world of work. The different approaches adopted in the volume reflect the heterogeneity of approaches taken when studying and writing about EDI. As such, the initial call for chapters which allowed authors extensive own voice has received a highly variable response from contributors. While some have focused on their work across a number of field studies with extensive self-reflection, others have chosen to concentrate on single studies with little reflection, which mirrored the diversity of ways in which EDI research is treated across cognate fields of study.

This book is organised across seven parts with several chapters in each part. Academic attention to EDI at work may sometimes lead us to believe that academia would be free from those inequalities that we study elsewhere. Counterintuitively, international research suggests that the higher education sector often lags behind other sectors in terms of its provision of EDI at work. In order to problematise this apparent gap between the espoused values of academic scholarship and its own practices in terms of equality of opportunity, recognition of diversity and the promotion of inclusion, Part I focuses on scholars, scholarship and inequality. This focus allows us to have an introspective, albeit critical, look at scholars and scholarship through the lens of EDI.

Due to its interdisciplinary exposure, the field of EDI benefits from waves of conceptual innovation. Part II is dedicated to chapters which seek to reframe our understanding of EDI, drawing on evidence from the field. The chapters allude to the significance of studying EDI from multilevel perspectives which bridge macro, meso and micro themes of EDI. In order to provide a platform in which EDI can be studied from multiple levels, Parts III and IV bring together chapters that explore EDI from macro-sociological and micro-psychological perspectives, respectively. Despite this broad thematic distinction of levels and disciplines, these chapters do not subscribe to purist standards of macro-, meso- and micro-level analyses and often provide more sophisticated and multilevel analyses. Part V looks at the politics of labour, providing an investigation of trade union organisation and EDI.

While most EDI-related work provides evidence from organisational settings, documenting current practices, experiences and processes, Part VI turns to the issue of management of change and interventions of EDI. This part departs from retrospective accounts of EDI in organisational settings and offers an assessment of change in the context and content of EDI at work.

Feminist critique of academic writing in the field of employment relations and work refer to marginal and compartmentalised treatment of issues of women as afterthoughts rather than central concerns. Reversing this trend, without disregarding women from the analysis of gender equality, Part VII is dedicated to men and masculinities in the context of EDI at work. This last, but not the least, part of the volume accounts for the continued transformation and domination of masculine order in the world of work.

## **Part I Scholars, Scholarship and Inequality**

Part I, in four chapters, examines the relationship between scholars, scholarship and inequality. In Chapter 1, Myrtle P. Bell provides an introduction, drawing on her experiences as an established academic in the field. Through this reflexive account, Bell examines the challenges facing EDI scholars and points to opportunities that this field of scholarship offers. Chapter 2 focuses on contemporary forms of gender inequality which plague academic employment. Patricia A. Roos examines how subtle forms of sex discrimination operate in academia, through beliefs, attitudes and relations at work, as well as structural mechanisms of policy and institution making. Roos achieves this by situating her framing of subtle mechanisms in recent theoretical developments in social sciences.

In Chapter 3, Diana Woodward provides a comparative account of her work on work–life balance in academic employment in the UK and Japan. Drawing on her findings, Woodward offers a cross-national account of the yesterday, today and tomorrow of gender inequality in academia and the ways through which academic women and men achieve work–life balance. The chapter also offers a number of strategies for combating gender inequalities in accommodation of work and life demands. In Chapter 4, Marianna Fotaki argues that the knowledge on institutional barriers produced by sociologists, and the feminist research illuminating the origins of social structures do not intersect in theorising about the position of women in universities, leaving out important aspects about the genesis and dynamics underlying this bias and discrimination. Using feminist psychoanalytic theory, and more specifically Luce Irigaray’s work, Fotaki considers this inequality as a foreseeable consequence of woman’s absence

from the socio-symbolic space and her in/signification in language and in the male scientific discourse.

## **Part II Reframing Equality, Diversity and Inclusion**

The field of EDI is characterised by waves of innovation, which reframe the way we conceptualise EDI at work. This part contains six chapters which reframe EDI at work in different sectors of work. In Chapter 5, Judith K. Pringle reconceptualises workplace diversity as a multilevel phenomenon spanning macro and micro levels of social reality. Pringle proposes that power and context are pivotal in explaining the dynamic nature of workplace diversity. In order to achieve this, she turns to the social theory of Bourdieu to operationalise her framing of power and context in workplace diversity. Drawing on her research on resilience of inequality in organisational settings, Geraldine Healy (Chapter 6) offers her reflections on researching inequalities and intersectionality. Healy's chapter underlines the significance of understanding context in order to investigate intersecting inequalities at work. The chapter also considers the appropriateness of Acker's concept of inequality regimes in reframing the way we study multiple forms of inequalities.

In Chapter 7, Jawad Syed argues for contextualising the diversity management discourse, in a way that considers local macro-national, meso-institutional and micro-individual factors as irreducibly inter-related. For this purpose, the chapter argues the case for a context-specific management research and develops a relational perspective for managing diversity. The chapter also illustrates why the cross-border transportation of the conventional US-based approach towards diversity management is problematic. In Chapter 8, Miri Lerner, Ayala Malach Pines and Dafna Schwartz outline the interplay between exclusion, inclusion and female entrepreneurship. They explain that owning a business is a way for women to climb out of poverty, and argue that the theoretical perspective of social inclusion/exclusion provides a conceptual framework for understanding different types of female entrepreneurship. This chapter presents Global Entrepreneurship Monitor data, showing that social exclusion of women in the labour market pushes them towards necessity entrepreneurship.

In Chapter 9, Iris Koall and Verena Bruchhagen argue that managing diversity can challenge hegemonic cultural assumptions within organisational processes, as diversity management offers the possibility of systems evolution, which can counteract the tendency of actors and constituent groups in modern organisations to resist perceptions of difference and otherness. This chapter also offers an examination of complexity in systems thinking as communication in organisations, which in

turn requires attention to inherent systemic paradoxes of organisational systems. Finally, Chapter 10 critiques the tendency of research on gender to adopt approaches of counting women, assigning certain attributes, attitudes and values to groups of men and women and using gender as a variable to test theories. In contrast, Elisabeth K. Kelan and Julia C. Nentwich explain the value of seeing gender as doing. The authors argue that reframing gender in this way allows researchers to question and to move beyond essentialist assumptions in research on gender at work.

### **Part III Sociology of Equality, Diversity and Inclusion**

In Chapter 11, Michael Meuser investigates the professionalisation of gender politics in Germany. He argues that gender politics is at a turning-point in terms of professionalisation, and may either go towards the emergence of a professional class in this field or peter out. Meuser's analysis points to the depoliticising effects of the process of professionalisation. Chapter 12 demonstrates that the problem of depoliticisation is not limited to gender politics, but endemic in the context of management. In this chapter, Alexander Fleischmann provides a queer reading and critique of scientific management. He argues that the construction of scientific management discourse is saturated with processes of othering and that the way we imagine a manager is, therefore, always limited to images of white, middle-class men.

Jean Helms Mills and Albert J. Mills examine processes and possibilities of making sense of and navigating the muddy waters of organisational life in ways which remain focused on issues of power. In Chapter 13, they define critical sensemaking and explain its possible uses for destabilising organisational inequities and supporting resistance. In Chapter 14, moving from individual navigation of inequalities to organisational settings, Shona Hunter explains that one of the most persistent and pressing problems for contemporary organisations is their contradictory relationship to processes of inclusion and exclusion. These contexts are characterised by the paradoxical recognition that racism, sexism and other social inequalities exist, coupled with an ongoing denial of their institutional reproductions, the 'recognition denial paradox'. Hunter describes how a feminist psychosocial approach can account for the paradoxical nature of unequal social relations.

### **Part IV Psychology of Equality, Diversity and Inclusion**

In Chapter 15, Johannes Rank explores employee proactivity as linked to notions of EDI and proposes a model of individual, situational and group-

level facilitators of diverse employees' voice and initiative based on findings of studies conducted on antecedents of proactivity. Complementing this chapter, in Chapter 16, Kurt April and Amanda April give voice to the psychological reactions of a group of disadvantaged workers. They explain that as diversity increases in the workplace, so does diversity in the nature of discrimination and exclusion that workers, especially foreign/immigrant workers, experience during employment. The authors provide a critical assessment of the psychological reaction of immigrant and foreign workers to such discrimination in the context of South Africa.

Neither the prognosis of inequality nor reactions to its redress operate with linear logics. For example, home and work interface has been studied extensively as a central concern of gender inequalities at work. In line with this tradition, T. Alexandra Beauregard, in Chapter 17, examines sex differences in the home and work interface; she finds that divergent expectations of women and men at work and home reduce the effectiveness of some individual strategies for reconciling the demands of work and home, and provides some counterintuitive findings. In Chapter 18, David A. Kravitz explains the reactions to efforts to redress inequalities through affirmative action. His analysis challenges the common assumptions about reactions to affirmative action and points to the complexity of such reactions.

In Chapter 19, Stephen M. Garcia, Mitchell J. Meyle and Eric A. Provins review the implications of another psychological phenomenon, 'people accounting', for equal opportunity in the workplace. People accounting is a hypothesis that a simple numerical imbalance in representation along nominal social category lines can affect third parties' decisions on whom to reward and offer opportunities in highly competitive situations. The authors demonstrate that highly competitive workplace decisions are routinely influenced by headcounts along mundane social category lines.

## **Part V Labour Politics, Trade Unions, Equality and Diversity**

In recent years, little attention has been paid to labour politics in the context of diversity and equality at work. In Chapter 20, Anne-marie Greene and Gill Kirton explain that there has been very little discussion about how trade unions view and have responded to the shift from 'equal opportunities'. They highlight the main features of diversity management which potentially threaten trade unions in the broader employment relations context. In Chapter 21, Sue Ledwith turns a critical eye on gender equality and diversity in trade unions and labour politics, arguing that there is a window of opportunity for trade unions to be reformed, so that they become more gender inclusive. Through an exploration of the main

theories of counter-hegemonic transformation, Ledwith offers a vision for trade union renewal.

## **Part VI Equality and Diversity Interventions and Change**

EDI scholarship has sometimes been criticised for being more interested in documenting inequalities and forms of discrimination and thus being less focused on future strategies for change and transformation. In this part, the authors focus more explicitly on what can be done to promote and operationalise equality, diversity and inclusion. In Chapter 22, José Pascal da Rocha questions the foundations and challenges of multiculturalism in order to explore complexities of pluralism. Furthermore, based on the methodological framework of comparative cultural studies, he offers a comparative and interdisciplinary approach to understanding intercultural challenges. In doing so, he points to the significance of interactions between the individual and the organisational structure in the process of change.

In Chapter 23, Mary Gatta turns our attention to the possibilities of collaboration between academics and practitioners. In doing so, she explains the importance of gender analysis of public policy, which in turn can become a tool for social change. Reflecting on the processes of an innovative training programme in the US, Gatta explains how academic–practitioner collaboration offers possibilities of progress towards greater gender equality.

Diversity training has received a mixed reception in organisational settings. In Chapter 24, Elaine Swan considers the possible reasons for this and provides a heteroglossic frame for understanding diversity and shaping diversity training. She explains that the monolithic conceptions of diversity management do not do justice to the wide range of tools for change and voices of representation that are present under the umbrella of diversity management and training.

Organisational change initiatives can be driven by voluntary efforts of the managers or enforcement of regulation at state and sectoral levels. The same is also true for the efforts to manage diversity and discrimination at work. Alain Klarsfeld, in Chapter 25, examines the voluntary and coercive measures to promote more effective management of equality and diversity in the context of France and argues the merits of coercive measures, which remain undersupported in contemporary diversity management literature.

In Chapter 26, Ronald J. Burke reviews the current evidence for positive outcomes of supporting the career development of managerial women. His chapter provides an assessment of a wide range of supportive organisational initiatives across a range of contexts, and points to the contribution of supporting women's career development to organisational well-being.

Daniel E. Martin, in Chapter 27, examines internal compensation discrimination and concludes that job evaluation systems and best practices associated with these should be subjected to further scrutiny to eliminate gender- and race-based prejudice. Martin outlines evidence from two studies to demonstrate the perseverance of bias in job evaluation systems.

## **Part VII Men, Masculinities, Equality and Diversity**

There is a tendency in literature to equate gender equality with women and feminism. However, in Chapter 28, Michael S. Kimmel argues that men should be included. He goes on to advocate the necessity of men's inclusion in the theory, politics and practice of gender equality as agents of transformation, rather than resistance, if equality is to be achieved. In Chapter 29, Jeff Hearn and David L. Collinson reflect on the absence of men in formulations of equality and diversity and argue that there is need for an analysis of gendered relations of power and domination in order to understand the significant role that men and masculinity play in the politics and practices of equality and diversity.

In Chapter 30, Jeff Hearn provocatively asks why gender equality is of interest to some, often relatively few, men and what are the promises, dangers and implications of bringing men into gender equality formulations. He provides a vision of gender equality in which men and men's power, influence and difference can be considered. The volume concludes with Chapter 31, by Michele Rene Gregory, who demonstrates the relevance of 'talking sport' to the pervasive processes of hegemonic masculinity, which is instrumental for white, middle-class men to construct knowledge, skills, difference and acceptability at work to suit their own lives, at the expense of excluding women and other men.

## **NOTE**

1. Bir deli kuyuya taş atmış, kırk akıllı çıkaramamış.

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## PART I

### Scholars, scholarship and inequality



# 1. Effects of the experience of inequality, exclusion and discrimination on scholarship

**Myrtle P. Bell\***

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## INTRODUCTION

Doctoral students and junior faculty are faced with many decisions about their careers and scholarship, and for people interested in equality, diversity and inclusion (EDI), those decisions may be even more critical than they are for people interested in other fields. Although perceptions of EDI as a field are improving, choosing it as a focal area is not always easy, comfortable, or encouraged. For some, however, choosing to focus on EDI is the only possible choice. As a doctoral student who already knew that doing such research was likely to be stigmatized, I was also encouraged to think carefully about being ‘the Black woman doing diversity research’ by those concerned about my future. Despite the words of caution, I knew that such research was what I had to do – it was really the only choice for me. I was indeed ‘born into the struggle’ (Mabuza, quoted in Upton, 1995, p. 618). As an American Black female, I had been living and doing diversity work all my life and had countless ideas, untested hypotheses, and life experiences with which to develop more. Life experiences generate passion about the topic, which is invaluable in generating ideas and also in giving one persistence in the face of rejection, criticism, and, at times, deep discouragement about the persistence and ubiquity of inequality.

In this chapter, I consider some of the issues relevant to choosing to focus on the field of EDI for one’s academic career. I begin by briefly discussing the experiences that led to my interest in and commitment to the field. Next, I discuss how life experiences can help in developing research questions. I conclude with some recommendations and encouragement for those entering or considering entering the field.

## LIVING AND LEARNING ABOUT EQUALITY, DIVERSITY AND INCLUSION

My work in the EDI field began in the state of Louisiana, in the Deep South of the United States. As in much of the US at that time, Louisiana was a racist, sexist environment in which to live. Growing up in the 1960s, I was familiar with ‘Whites only’ water fountains, restrooms, and waiting areas. I watched many a movie from the balcony of a popular theater, where Blacks sat, while White patrons watched from below. I learned about racial profiling, unwarranted arrests, and ensuing stints in jail through the experiences of family and friends. Thankfully, because they were well educated and had resources, my family and friends who were unfairly targeted and racially profiled were able to prevail and continue the struggle. I learned through them to be concerned about the unfairly targeted who are less fortunate. Through the Civil Rights movement, in which Blacks in the US obtained some freedom from overt oppression, I internalized the benefits of activism and working for change.

Within the Black community in which I lived, I learned about sexism, class differences, sexual minorities, and weight and appearance issues. From my mother, who was a professor at a historically black university (HBCU: historically black college and university) being paid less than male faculty because of her sex, I grew to understand sex-based pay discrimination. I saw first hand how being a woman of color multiplied disadvantage and caused women of color to work harder, for fewer rewards, than many others (see Amott and Matthaei, 1991; Browne and Kennelly, 1999; England et al., 1999). From her, I also learned to care about and fight for the underdog and to resist oppression whenever it appeared. Our home was a ‘home away from home’ for international students from Africa, South America, and Asia and for Black and White Teacher Corps participants from around the US. Through many weekends and month-long Christmas breaks when they stayed at our home, I learned from these diverse students, some of whom remain friends and ‘brothers’ to this day, that similarities, differences, and a common humanity exist in people from the US and around the world.

In junior high I moved from an all Black school to a virtually all White school, where I was one of two Blacks in a class of 58 students. There I taught diversity each day, coping with the students who asked if I knew their maid, telling them that not all Blacks knew each other. I taught diversity by calling the Black custodians ‘Mr’ and ‘Mrs’ while many of the White students called them by their first names. There I also grew to understand that not all Whites were racist, even as I helped teach diversity to those who were willing to learn.

My diversity teaching and learning continued when I went to study at a university that was about 97 percent Catholic, 75 percent male, and 98 percent White, while I was Protestant, female, and Black. On the dorm move-in day, after we had exchanged letters during the summer discussing who would bring what to our room, my freshman roommate screamed 'she's colored!' as she fled to request a room change. (Apparently, my name, Myrtle Perkins, did not 'sound Black', which would have given her some advance warning and the opportunity to discriminate earlier, as researchers have recently found happens to job seekers: Bertrand and Mullainathan, 2004.) Humored, I laughed that no one said 'colored' any more and kept moving my things into the room. My roommate's request to move because I was 'colored' was denied by a new (and I later learned nervous) dorm rector who, in the absence of procedures to deal with such events, stood on her beliefs about right and wrong. From the rector's actions, I learned that principled organizational leaders can make strong statements through their individual actions.

After graduation from college, I was one of five Blacks who began the MBA program at Louisiana State University (a school to which my father had been denied entry less than thirty years earlier because he was Black). As one, two, three, and then the last of my Black classmates left the program, I learned to seek out other 'others' for team projects and companionship. In my last semester, I sought out a woman from Malaysia, who wore a head scarf and long clothing, part of her religious attire. She, also an outsider, was happy to be approached by and to work with me, another outsider. Our completed project was the best of my entire MBA program.

During the interview for my first real job, at a large corporation, ironically, noted for its diversity initiatives, I experienced sex discrimination and stereotyping when the man who would become my manager asked why a 'pretty young girl' like me was still single. Having thoroughly planned my answers to potential interview questions, I was stunned and confused about the purpose of that question. After wracking my brain for an appropriate answer, I stammered that, at 22, I was too young to get married. I found out later that he probably assumed young women got married and quit working to rear children, and that assumption almost prevented my being hired. Thankfully, I was able to convince him that I had no intention of getting married and wanted to use the MBA I had just earned.<sup>1</sup> I was offered, and accepted what I thought would be the job of my dreams in an organization that I believed was committed to equality.

As I worked, however, I observed more stereotyping, sexism, and racism, and continued my diversity learning. The glass ceiling, glass walls, and Black ghettos, in which large numbers of Blacks were clustered in

jobs with little responsibility or opportunity for advancement, were strong evidence that I would not be able to spend my career in that organization. After eight years, I began preparing for another job and began studying for a PhD. As I studied, I was able to combine courses in organizational behavior, human resources, international management, and sociology with my questions about work, society, and (in)equality and grew excited about the impending career change and questions I would ask. I concur with Patricia Hill Collins's (2000) assertion that Black women's position as 'outsiders within' can foster new insights on oppression and exclusion.

## COMBINING LIFE AND UNIVERSITY LESSONS IN DEVELOPING HYPOTHESES

Once in a doctoral program, I indeed began to apply my 'outsider within' experiences to topics about which I was studying and was relieved to find that others were also passionate about studying in the field. Having lived three decades as a Black female, in environments that were often hostile to people like me and to other non-dominant group members, I had many questions about racism, sexism, homophobia, and appearance discrimination. In the seminar in human resources, as I read about treatment discrimination (Greenhaus et al., 1990), I understood more about why the Blacks in my organization were clustered in a small number of jobs, often viewed as incompetent, and appeared to receive lower performance evaluations and fewer promotions, even though they were well qualified, performed well, and the organization was ostensibly a diversity-friendly place. Questions about how such paradoxes could exist remain important ones to me and continue to influence my work.

In an international management class, while learning about high US expatriate failure rates, I saw the similarities in expatriates' experiences, as outsiders, and those of racial and ethnic minorities, as outsiders, in the US. Accustomed to being stared at, having their hair or skin touched, and having their families know those experiences also, I believed minorities as expatriates in a foreign country would not be so apt to return early in frustration, having been outsiders in their own countries. In making the 'case for selection of ethnic minorities as expatriates' (Bell, 1994a, p. 122), I applied those ideas to what would become my first journal article (Bell and Harrison, 1996). While shaping that idea into the manuscript it ultimately became, I presented a version at the 1994 Academy of Management meeting in Dallas, which was my first attendance at such a meeting (Bell, 1994b). I was fortunate that V. Jean Ramsey was the first person to come to my session and we established an instant and lasting bond. In reading the conference program

and learning that Ramsey worked at an HBCU, I had assumed she was African American and was looking forward to meeting her. I was shocked to see a White woman, and when I told her I had assumed she was Black, we both laughed as she said that many people make that assumption, given where she works, but that few people say it to her face.

Ramsey, a seasoned scholar and, in my view, a scholar activist who follows her heart, encouraged me to do so also. She invited me to contribute to her forthcoming book, *Listening to the Soul and Speaking from the Heart: The Joys and Complexities of Teaching about Workplace Diversity* (Gallos et al., 1997). The other contributors were respected EDI scholars; I was the only doctoral student contributor. Through this collaboration, I was fortunate to meet many scholar activists and forge bonds with them that provided real and psychological support as I continued my doctoral studies, continually asking and learning about EDI.

One important question asked why research continually said that diverse groups would lack cohesion. I was puzzled because I was still working in industry and my work group was diverse in race, sex, and age, but was still extremely cohesive and productive. Conversations in a semester-long independent study with a patient, thoughtful, and open-minded advisor, David A. Harrison, helped focus and further shape the question and ultimate answer: in some groups, surface-level differences matter in the short term and attitudinal differences matter over time (Harrison et al., 1998). Questions about strong resistance to affirmative action, which to me is clearly a worthwhile program, led to my dissertation research (Bell, 1997; Bell et al., 2000). Hearing that Asians were often viewed as the ‘model minority’ (for a discussion, see Nkomo, 1992; Thatchenkery and Cheng, 1997) but knowing of the experiences some Asians faced with racism and the glass ceiling in formal organizations, I wondered how Asians felt about affirmative action and how much they reported experiencing discrimination. In answering that question, I learned that their affirmative action attitudes and experiences with discrimination are more similar to those of Blacks and Latinos than to those of Whites (Bell et al., 1997).

After graduation, I continued to apply questions about diversity issues that stemmed from life experiences to my research. Ideas about ways that women managers could reduce the occurrence of sexual harassment led to an article about women managers being specifically appropriate as change agents in efforts to reduce sexual harassment (Bell et al., 2002a). As a domestic violence survivor and former human resources practitioner, relationships between domestic violence and work and employability for women and the need for decisive and helpful organizational actions when it occurs were clear to me (Bell et al., 2002b; Moe and Bell, 2004; Kwesiga et al., 2007).



## RECOMMENDATIONS

My scholarship is now focused on ‘diversity and social issues at work’, including such issues as racism, sexism and sexual harassment, along with social issues, such as domestic violence, underemployment, and work–family issues for low-wage workers. I continue to find new, interesting, and important areas of EDI to study, all focused on enabling people, regardless of their race, sex, age, ability, sexual orientation, or other non-job factors, to be able to work and be treated fairly. As with many other feminist researchers (see Newton, 1988; Scott, 1991; Collins, 2000; see also Hawkesworth, 1989), I do not seek or espouse any claim of ‘objectivity’ in developing research questions. Instead, I encourage readers to use their life experiences and passions to develop their research questions, acknowledging the unique questions that derive from one’s unique experiences and perspectives. Make notes of ideas that come to mind. If the ideas come at unexpected times (perhaps in the night, while trying to drift to sleep), jot them down somewhere, and put them in the central repository as soon as possible. As the ideas grow into something more substantive, begin a document file and as appropriate, add citations, notes, and other useful information to that file. When reading journal articles or following the news, when relevant connections to ideas are made, make a note of those connections. When the time is appropriate, perhaps a call for papers, it will be easier to return to the idea file and begin writing in earnest than to start from scratch, or worse, to know you had a good idea about the topic, but can no longer quite remember it.

Finding other EDI scholars for collaboration, brainstorming, idea-generation, and encouragement is critical to success in the field of EDI, as in any other field, but perhaps even more so because of the continued, although declining, resistance to diversity scholarship in some organizations. Forge relationships with others outside one’s immediate university who are experts and novices in the field. Experts can help, and novices can grow together. For doctoral students, ideally, one’s advisor would be supportive and knowledgeable about the field. Because the field is still relatively young, however, one may need to focus on finding a supportive and open-minded advisor and the learning may occur in tandem.

### **Passion and Publishability**

Research in the field is now considerably more acceptable than it has been in the past, including in the most highly regarded outlets. Harrison and Klein (2007) note that the volume of diversity and related research in articles included in ABI-Inform and Psych Info has nearly doubled every five years,

growing from 19 in 1988, to 45 in 1993, 66 in 1998, and 134 in 2003. For a narrower search, between 1987 and 2007, nearly 50 articles with the word 'diversity' in the title were published in the *Academy of Management Journal*, *Review*, *Executive/Perspectives*, and *Learning and Education*.<sup>2</sup> When articles on relational demography, discrimination, race, gender, and other related topics are included, considerably more diversity-related articles were published in that timeframe in Academy of Management journals.

Those entering the field should be encouraged by the increase in published articles; however, EDI researchers are sometimes still faced with doubt about the relevance of such research to the broader field of management (Cox, 1990; Cox and Nkomo, 1990; Avery, 2008). EDI research is sometimes still marginalized and viewed as tangential, particularly by administrators who may be unaware of the growth, progress, and contributions of the field. Further, in certain journals, there continue to be limited numbers of editorial board members who have sufficient expertise to provide substantive feedback. I encourage readers to be careful of the outlet chosen for their research and to seek alternative journal outlets (including those from other fields) when appropriate. However, it is important to remember that to earn tenure, one has to have a certain minimum number of publications in outlets recognized and valued by decision makers in one's organization. Without some level of job stability, it is difficult to be concerned with EDI or passionate about one's subject. Further, without some publications in 'recognized' journals, one's work may continue to be viewed with skepticism.

Some specific recommendations for those entering the field are:

1. Carefully investigate potential journal outlets. Who are the editors and members of the editorial board? What articles have been published previously in such journals? Have relevant articles published in the targeted journal been analyzed and cited?
2. Develop a network of people interested in EDI research with whom you can collaborate and who will review manuscripts prior to submission. Find collaborators who are interested in the same research areas as well as those with complementary interests.
3. Look outside one's immediate field to include research in human resources management, organizational behavior, psychology, social psychology, communication, social work, political science, education, and criminology, among others, for ideas and stimulation.
4. Read a variety of books and journals, as often very good work is published where one might least expect it. Cite the good work you find, as doing so will increase the opportunity that others will read and recognize such work and outlets.

5. Be aware of articles in the popular press and practitioner outlets in order to know what practitioners and research participants are reading and may be thinking about issues relevant to the field. The misinformation, stereotypes, and biases sometimes found in such outlets can be useful in stimulating ideas and in generating hypotheses.
6. Be willing and able to convince doubters of the importance of EDI research. It is certainly relevant to every aspect of management, including human resources (for example, recruitment, compensation, training and development, retention and so on), organizational behavior (motivation, job satisfaction, and so on), and strategy, as well as to ethics, law, sociology, psychology, gender studies, and numerous other fields.
7. Consider what it is that is unique about you, your background, and interests that can be used to develop questions that contribute to the field. Do not be afraid to work from the strengths of your identity. Using one's identity to help develop research questions is appropriate, as long as one's methodology, analyses, and research reviews are thorough. One's unique identity and passions are invaluable in developing unique questions, often about topics that may appear to already be thoroughly researched and understood.
8. Consider one's interest in EDI in choosing an academic position. The growing interest in the field among universities and in industry have increased the level of interest in scholars of EDI, therefore, employment opportunities are likely to be better than ever. Increasing numbers of schools have centers for equality, diversity, and/or inclusion; others include diversity in their ethics centers; still others are adding standalone courses or concentrations in diversity (Bell et al., forthcoming). In addition to one's immediate department, determine if there are colleagues in other disciplines at the university with whom bonds and research collaborations may be forged. Existence of EDI faculty in various disciplines may also be indicative of a favorable climate toward EDI research in the institution as a whole.

## CONCLUSION

As I work with and mentor students interested in EDI, I encourage them to follow their hearts while also doing work that is important to them *and* publishable. The field is open and opportunities and rewards are great. Be confident in pursuing EDI scholarship with a passion and a purpose. While skeptics and critics are to be expected, so also is success as a result of passionate commitment and pursuit of a worthwhile goal: overcoming inequality, exclusion, and discrimination through scholarship.

## NOTES

- \* The author wishes to thank Daphne P. Berry for helpful comments and suggestions.
1. I wondered why he even thought I might quit work to rear children, as I knew no Black women who did not work. I later learned about differences in participation rates and that Black women are more likely to be employed than women of any other racial or ethnic group. I also learned about the folly of applying to all groups the experiences of the dominant group (Nkomo, 1992).
  2. Not including book reviews.

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## 2. Subtle mechanisms: reproducing gender inequity in academia\*

**Patricia A. Roos**

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### INTRODUCTION

Issues of gender equity in the academy have re-emerged as front page news. In January, 2005, Harvard University's President Lawrence Summers addressed a Conference on Diversifying the Science and Engineering Workforce. His claim that 'intrinsic' differences between men and women play an important role in creating sex differences in achievement in science reverberated across academe, and beyond. The resulting furor revived memories of March 1999 news stories about the Massachusetts Institute of Technology's (MIT) admission that it had discriminated against its women faculty (Goldberg, 1999). The MIT report documented extensive discrimination against senior women, who were by all reports stellar members of the university and gifted scientists in their larger professional communities.

Gender equity researchers have shifted in recent years from explanations that posit overt discrimination, to more subtle forms of favoritism and/or barriers to women's advancement. Synthesizing and building on research in this latter tradition, I examine how this more subtle sex bias operates in practice. I thus focus attention on the various mechanisms that reproduce gender inequity,<sup>1</sup> through nonconscious beliefs and attitudes that operate via workplace interactions, and through the use of subjective policies and procedures institutionalized in the academic workplace.<sup>2</sup>

### NARROWING THE GENDER GAP

With its study of Radcliffe graduates in the 1950s, Harvard University published a report on sex discrimination in higher education (Radcliffe Faculty Trustee Committee, 1956). Instances of overt discrimination were not hard to find. Reflecting the sex inequity in the larger workplace, women in academia consistently reached only the lower academic ranks,

and earned lower salaries than comparable men. Sociologist Jessie Bernard (1963) found similar results in her in-depth investigation of discrimination against women in the academy (see also Zuckerman et al., 1991; Sheridan, 1998).

Perhaps the best documented inequity is the male–female earnings gap. Glazer-Raymo (1999) found evidence of a gender wage gap at every academic rank, institution, and discipline (see also Long, 2001: Ch. 7). The male–female earnings ratio is highest in the initial academic ranks, and that ratio declines (and hence, the earnings gap increases) the higher the rank. Most researchers agree that the net sex gap in earnings has declined over time: Long (ibid.: 216) found that the net gap declined to 15 percent in 1979, and 10 percent in 1995.<sup>3</sup> Earnings differences reflect job segregation: men predominate in top-paying fields of law, engineering, physics, and computer science, while women typically work in lower-paying fields of elementary education, visual and performing arts, and home economics. Furthermore, women are overrepresented at the lower ranks (for example, full-time instructors and assistant professors), while men predominate at the upper levels (for example, full professors and above; Long et al., 1993; Bellas et al., 2001; Long, 2001).

Women in academia face ‘marriage’ and ‘baby’ penalties: they are more likely than men with similar family characteristics to ‘leak out’ of the academic pipeline, especially if they have children early in their career (Mason and Goulden, 2004). According to a recent National Science Foundation (2004) report, the effect of sex on tenure–track placement and tenure disappears once family characteristics, and sex–family interactions, are taken into account. Significant sex differences in promotion to full professor persist, however, even after family characteristics (and interactions with sex) are controlled.<sup>4</sup> Rather than attribute these family effects to sex differences in ‘choice’, Mason and Goulden lay the blame squarely on the rigid nature of academic institutions and the lock-step nature of academic careers (p. 88). Biological clocks collide head on with tenure clocks, especially in academic occupations that demand long hours on the job (Cole and Singer, 1991; de Wet et al., 2002).

It is also important to bear in mind the effects of demographic changes in higher education. Because women are now the majority (51 percent) of doctorates among US citizens, more women should have the opportunity to enter faculty positions (Peter and Carroll, 2005: iii; see also Jacobs, 1996; Hoffer et al., 2003). Even in the absence of discrimination, however, demographic inertia alone ensures a substantial lag time before women will be equitably represented in the faculty ranks (Hargens and Long, 2002).

Although I focus here on the US, the gender patterns I describe are

similar elsewhere. For example, despite women's greater representation in higher education (103 women to every 100 men, in a recent study of European Union (EU) countries), they were notably underrepresented in academic positions (Ledwith and Manfredi, 2000: 8). Healy et al. (2005: 251) reported that on average 35 percent of academics in 25 EU countries were women, but only 14 percent of full professors were.<sup>5</sup> Finally, despite the protection of equal pay legislation, women in the United Kingdom (UK) earn less than their male counterparts and are more likely to be on 'insecure contracts' (tenure was abolished in 1988; Knights and Richards, 2003: 215–17).

## THE MIT REPORT AND BEYOND

MIT's 1999 report reflects the public face of the shift in gender equity research from overt to more subtle forms of discrimination (see also Hopkins, 1999).<sup>6</sup> Although the published MIT reports were not detailed, what made its way into the public record is nonetheless an exceedingly frank discussion of the inequities women faculty confront. The faculty gathered data on salary; space; named chairs, prizes, and awards; grant-based salaries; teaching assignments; departmental or university committee assignments; outside professional accomplishments/committees; and the representation of women at all levels of the university (undergraduates, grad students, postdocs, faculty). They talked both to senior and junior women, and to male department heads. The study's key finding is that, contrary to the more blatant discrimination of the past, '1990s discrimination' is more subtle, stemming from 'unconscious ways of thinking that have been socialized into . . . men and women alike'. The 'pattern of discrimination' the report documented could not be explained by individual circumstances. In the interviews, senior women described themselves as 'invisible' and 'marginalized'. Junior faculty women at MIT reported that they felt well supported, but senior women had once felt equally supported. The report concluded that invisibility and marginality are being replicated in succeeding generations. The 2002 follow-up reports found similar evidence of marginalization and inequity in the other MIT schools: women reported their exclusion from group grants, noninvolvement on PhD theses, lack of influence in important decision making, and undervaluing women as well as their fields of research.

Under pressure from their own faculty, other universities followed suit (Wilson, 1999; Zernike, 2001),<sup>7</sup> and foundations also began to take notice.<sup>8</sup> Like MIT, Princeton's report identified 'climate' issues: more women than men reported encountering unprofessional behavior, less



collegial departments, and problems with childcare. Women were less satisfied than men, and this sex gap in satisfaction was significantly greater among tenured faculty (Princeton University's Task Force on the Status of Women Faculty in the Natural Sciences and Engineering, 2003). Harvard, too, began a process of self-reflection, produced a report, and pledged \$50 million to address gender equity issues (Fogg, 2005).<sup>9</sup> In an ironic epilogue to the Summers brouhaha, in February 2007 Harvard named its first ever woman president, Drew Gilpin Faust. Furthermore, even the prestigious National Academy of Sciences has argued for greater focus on the more subtle forms of discrimination limiting women's access and advancement in science and engineering (NAS Committee on Maximizing the Potential of Women in Academic Science and Engineering, 2006).

## SUBTLE MECHANISMS AND THE REPRODUCTION OF INEQUITY

The original empirical evidence documenting subtle gender inequity in higher education was rooted in the 'chilly climate' literature (Sandler, 1986; Chilly Collective, 1995), which found the existence of barriers to access and mobility that operated below people's level of awareness.<sup>10</sup> Although empirical research on gender equity continues to grow apace, few researchers have linked this work to recent theoretical advances in the social sciences on subtle (or informal) mechanisms that reproduce gender inequity.<sup>11</sup> My task in this chapter is to further this theoretical goal (see Roos and Gatta, forthcoming, for related empirical findings).

Underlying much social science work on gender equity is the assumption that continuing gender (or race) inequity in academia reflects the outcome of conscious decision making of those in positions of authority to discriminate against women (or minorities). In her analysis of 'ascriptive' inequality, or inequity based on ascriptive factors such as sex (or race), sociologist Barbara Reskin (2003) argues that our theories have typically focused on 'unobservable', and empirically 'untestable', motives of decision makers and peers. Indeed, conflict theories – long favored in sociology to explain the 'whys' of ascriptive inequality – assume that 'dominant groups use their monopoly over resources to maintain their privileges' (p. 2). As Reskin points out, however, gender inequity can also be reproduced by nonconscious cognitive processes that operate as much to favor 'ingroups' as disfavor 'outgroups' (Roth, 2004 similarly investigates homophily preferences among Wall Street securities professionals; see also, Roth, 2006).

I focus here on the ‘hows’ of ascriptive inequality, or the specific mechanisms that produce sex differences in outcomes in higher education (Reskin, 2000, 2003). Even as more overt forms of discrimination lessen, we need to move beyond the motives of decision makers, to examine how ascriptive inequality is reproduced in the academic workplace. As Bielby (1991: 185–6) points out, eliminating such barriers may be ‘more difficult than dismantling [other forms of] exclusionary practices’.

Ascriptive inequality is reproduced in everyday *workplace interactions* that occur within a hierarchy of gender status beliefs that tend to advantage men and disadvantage women. As Ridgeway argues, gender operates as a cultural ‘superschema’ that shapes how we perceive others in our everyday interactions:<sup>12</sup> ‘[s]ex categorization pumps gender into the interactionally mediated work process by cueing gender stereotypes, including status beliefs, and by biasing the choice of comparison others’ (Ridgeway, 1997: 231; see also Ridgeway and Correll, 2000). Such stereotypical beliefs can be exacerbated by generational differences: for example, academic elites who came of age at a time when few women worked might have very different evaluations of women’s competence from those whose mothers worked and/or whose sisters and women friends compete with them in the workplace.

Gender stereotypes are particularly salient when they become institutionalized, consciously or unconsciously, in organizational policies and decision making (Roos and Reskin, 1984). Organizational elites regularly map external asymmetrical categories (such as male–female) to intra-organizational distinctions (for example, jobs), thereby recreating socially-based stratification within organizations. Tilly (1998: 11) argues that such mapping can be inadvertent: ‘[p]eople who create or sustain categorical inequality . . . rarely set out to manufacture inequality as such . . . [rather] they solve other organizational problems by establishing categorically unequal access to valued outcomes’.<sup>13</sup> For example, if securing an outside offer is the mechanism whereby faculty members significantly boost their salaries, those less able to take advantage of this strategy (presumably women) lose out financially in the long run.

The key to reproducing inequality, for both Ridgeway and Tilly, is the interactional (or ‘relational’) nature of social relationships. In academia, personal interactions underlie much of our everyday work lives, making higher education an excellent laboratory for investigating subtle mechanisms. For example, we evaluate vitae; interview job candidates; negotiate salaries; engage in research with colleagues; teach our students; assess scholarship, teaching, and service for promotion and merit increases; attend faculty and other committee meetings; and meet with academic administrators. As this list indicates, much of what academics do involves

the application of *subjective* judgments of those with whom we interact. Our academic judgment of the quality of a colleague's work is inherently ambiguous, depending in part on our subfield, methods, theoretical approach, academic age, and even, personalistic criteria. It is precisely in such ambiguous interactions, that evaluators tend to fall back on gender schemas, and/or personalistic biases. To the extent that culturally-based gender beliefs infuse our work interactions, or are automatically reproduced (and institutionalized) within work interactions, women can lose more than men.<sup>14</sup>

Social psychologists have made much headway in recent years identifying the kinds of nonconscious attitudes and beliefs that help to reproduce ascriptive inequality in academia. Among these are 'implicit attitudes or stereotypes' that impact on our evaluations of people's behavior, competence, and/or performance. Building on the demonstrated weak link between attitudes and behavior (for example, Greenwald, 1990), social psychologists have developed and fielded response latency methods to measure the kind of discriminatory social behavior that operates at a nonconscious level.<sup>15</sup> Designed to quantify implicit attitudes, the Implicit Association Test (IAT) measures 'actions or judgments . . . under the control of automatically activated evaluations, without the performer's awareness of that causation' (Greenwald et al., 1998: 1464; see also Greenwald and Banaji, 1995). For our purposes, such 'indirect' methods are particularly important in demonstrating how attitudes and stereotypes about gender can operate in nonconscious (as opposed to 'self-reportable', conscious) ways to reproduce ascriptive inequality.<sup>16</sup>

The empirical evidence for such implicit attitudes or stereotypes is large, and growing, and directly relevant to day-to-day interactions in academia. Reviewing empirical findings, Greenwald and Banaji (1995: 9–17) describes Thorndike's 'halo effect' (for example, physical attractiveness increases the likelihood of holding prestigious jobs, or institutional prestige enhances the acceptance of journal articles); 'implicit race stereotyping' (for example, stronger association between the word pair 'White-smart' versus 'Black-smart'); and 'implicit gender stereotyping' (for example, essays with male names were judged as superior to those with female names). Rudman and Kilianski (2000: 1325) found that *implicit* gender attitudes toward female authority figures are similarly negative for women and men, even though women's *explicit* attitudes toward female authorities are more egalitarian than men's. Similarly, Rudman and Glick (2001) found that those who implicitly view women as 'nicer' than men (for example, women are more communal, and men are more agentic) are more likely to judge female applicants as 'unskilled and unlikeable' (p. 758). Such findings underscore how implicit

beliefs – among both women and men – can hinder women’s recruitment to, acceptance in, and mobility in academic positions, especially positions of power and authority.

Although implicit beliefs operate in nonconscious ways, they are not impervious to change. We can indeed ‘unlearn our automatic biases’ (Rudman et al., 2001). With respect to the effect of implicit attitudes on work-related judgments (for example, admission decisions, personnel evaluations), research shows that increased distraction or time pressure increases the reliance on ethnic and gender stereotyping. Thus, presumably greater focus and reduced time pressure could reduce the implicit tendency to stereotype (Greenwald and Banaji, 1995: 18). Also useful are findings (p. 19) that suggest strategies to blind the decision maker to potentially biasing information and to raise awareness among decision makers about possible sources of bias. Similarly, Rudman et al. (2001) found that, compared with a control group, enrollment in diversity education reduced both implicit and explicit anti-Black prejudice of college students.<sup>17</sup>

With respect to higher education, these nonconscious attitudes and stereotypes operate as ‘gender schemas’, which can work in similar ways for women and men and function either positively, negatively, or neutrally (Valian, 1998: 103–4). In the arc of one’s academic career, disadvantages (or advantages) cumulate over time to reproduce significant sex differences in achievement over the life course. Cole and Singer (1991) describe this accumulation of disadvantages (or advantages) as ‘negative (or positive) kicks’ that in turn produce ‘reactions’. To the extent that women in science experience a larger number of negative kicks (for example, less prestigious postdoc position, grant rejection, birth of child), the gender success gap will widen. In dealing with all those everyday inequities, we are often told to ‘not make a mountain out of a molehill’, an admonition that fails to recognize that ‘mountains *are* molehills, piled one on top of the other’ (Valian, 1998: 4–5).

Accumulating advantages (or disadvantages) can also multiply other sex differences, whatever their source. For example, economists have pointed out that men are more likely than women to negotiate starting salaries: Babcock and Laschever (2003) argue that taking such differences into account entirely eliminates the sex difference in starting salaries. The power of cumulative advantage (or disadvantage) yields ‘an enormous “return on investment” for a *one-time* negotiation’ (p. 5). Babcock and Laschever estimate that, even with identical raises in later years, a \$5,000 difference in initial negotiated salary translates into extra male earnings of about \$360,000 over the course of a 38-year career (and over \$500,000 if the male earned 3 percent interest on the yearly salary difference).

## TOWARD GENDER EQUITY IN ACADEMIA

The usefulness of the model of gender inequity I discuss is to unearth the subtle mechanisms that can inhibit women's access to, and advancement in, academia. As the more overt discrimination faced by earlier generations of women faculty has declined, what remains are the more subtle forms of favoritism (or disfavor) that can cumulate to sizable advantages (or disadvantages) over the course of an academic career. Recognizing how sex differences in outcomes get reproduced within workplace interactions, and how they are written into subjective policies and procedures institutionalized in the academic workplace, is an important first step toward awareness of how such mechanisms operate to reproduce inequity. The next step is to devise institutional mechanisms to counter this reproduction.

Academic administrators, for example, need to be aware of historical legacies that can operate to reproduce ascriptive inequalities. In one university, men's predominance among the highest-ranking professors was attributable to a major hiring initiative that occurred in the 1980s when the state and the university joined forces to upgrade the university's research infrastructure and faculty (Roos and Gatta, forthcoming). Importantly, many of these senior professors were hired into the mathematical and physical sciences, fields where women are few in numbers.

Roos and Gatta also found evidence of perceived gender bias in how chairs, faculties, and deans managed the promotion process, negotiated research support, and allocated supplementary funds. Their respondents described feelings of invisibility and marginalization, lack of support for recruiting women, exclusion from important departmental and university committees and department research teams, and lack of access to leadership positions.

With respect to salaries, given the long-term consequences of initial, one-time salary negotiations, administrators should be wary of sex differences in starting salaries for faculty, all other things being equal. Ridgeway and Correll (2000: 115–16) argue that one important consequence of equalizing male–female salaries would be to reduce the sex difference in perceived competence that inevitably results when male salaries are higher than their female counterparts. Sex differences in salaries can also widen if salary increases occur primarily through outside offers, because women are typically less able to take advantage of such possibilities. Roos and Gatta (forthcoming) found that male faculty were more likely than their female counterparts to receive discretionary summer salary from successful negotiations re outside offers.

When inequities arise from nonconscious attitudes and beliefs, or

organizationally-based policies and procedures designed for other purposes, they can be more difficult to eradicate than the more overt forms of bias visible in the past. The intractable nature of such inequities is underscored by their ubiquity. Although I have focused on the US, data from other countries also demonstrate similar kinds of subtle inequities. Data from the UK suggest that lack of transparency, proper procedures, and monitoring contribute to gender inequity in academia: a set of ‘masculinist practices’ that marginalize women academics (Ledwith and Manfredi, 2000: 12–13).<sup>18</sup> Knights and Richards (2003: 220, 231) further describe the institutionalization of the Research Assessment Exercise (RAE) in the UK: although designed as meritocratic, in practice the RAE disadvantages women (for example, because their greater childrearing responsibilities reduce their time to produce published work). Fuller documentation of the applicability of this model of gender inequity awaits further study.

## NOTES

- \* I thank the following for their comments or suggestions on earlier versions: Mary Gatta, Deborah Carr, Lee Clarke, Mary Hartman, Angelique Haugerud, Mustafa Özbilgin, Laurie Rudman. This chapter is part of a larger project with Mary Gatta on gender equity in higher education.
1. Although ‘inequity’ and ‘inequality’ are often used interchangeably, I prefer the former, following the usage of health researchers who use ‘inequity’ to indicate ‘unjust inequalities’ (Pan American Health Organization, 1999: 11).
  2. See Roos and Gatta (forthcoming), for an empirical evaluation of the forms of inequity I describe here, using data from a state university in the northeast.
  3. Long (2001) used the Survey of Doctorate Recipients (SDR) to examine sex differences in salaries for the years 1973 to 1995. He controlled for rank, field, professional age, and sector.
  4. The National Science Foundation (2004) used SDR data for those reporting full-time work in academia and who were surveyed between 1981 and 1997. The data include only those earning science (including social science) and engineering doctorates in the US. The authors assess three measures of family characteristics: marital status (married versus not), number of dependent children less than 6 years, and number of children between 6 and 18 years. The interaction model includes the interactions between these variables and sex.
  5. Healy et al. (2005: 250) also reported that 56 percent of college graduates in 15 EU countries were female. See also Mischau (2001).
  6. There are actually several ‘MIT reports’: (1) a set of unpublished committee reports produced by the First and Second Committees on Women Faculty in the School of Sciences at MIT (1995–97, 1997–99); (2) a public summary of these reports designed to alert MIT’s faculty about the Committees’ conclusions (MIT, 1999); and (3) follow-up reports in 2002 from the four other MIT schools: Humanities, Arts, and Sciences; Architecture and Planning; Engineering; and the Sloan School of Management (for an overview, and all five MIT reports, see Hopkins et al., 2002). There was also a brief 2002 update on the 1999 School of Science’s report. For online access: <http://web.mit.edu/fnl/women/women.html> and <http://web.mit.edu/faculty/reports/overview.html>.
  7. The National Academy of Sciences Committee on Women in Science and Engineering

reports a list of gender faculty studies at Research I institutions, by state: [http://www7.nationalacademies.org/cwse/gender\\_faculty\\_links.html](http://www7.nationalacademies.org/cwse/gender_faculty_links.html).

8. The Ford Foundation provided resources for an MIT conference on gender equity (Wilson, 1999), and a research/action grant to Rutgers University to examine the role of faculty as change agents for diversity. The National Science Foundation initiated institutional transformation awards, through its Advance program. State legislatures have also exerted pressure to ensure gender diversity (California State Auditor, Bureau of State Audits, 2001; see also West et al., 2005, <http://universitywomen.stanford.edu/reports/unprecedented.pdf>).
9. The Harvard report and recommendations are available online: <http://www.news.harvard.edu/gazette/daily/2005/05/women-faculty.pdf>. By February, 2006, President Summers had resigned, attributing his departure to persisting rancor with the Harvard faculty, including fallout from the women in science issue, among others (Wilson, 2006).
10. More recent research has documented how the chilly climate can be especially severe for women of color (Turner, 2002).
11. And, it's not just academia: corporate America is also beginning to take note of the more subtle barriers to women's advancement (Burk, 2005; Morris, 2005; Roth, 2006).
12. Race and age are two other cultural superschemas (Fiske, 1992: 883). Race similarly operates in social interactions to cue racial stereotypes.
13. More generally, Tilly (1998) argues that four 'relational' mechanisms reproduce categorical inequality: (1) exploitation (elites extract resources from workers); (2) opportunity hoarding (elites and nonelites protect their access to resources); (3) emulation (linking external categories to internal differentiation); and (4) adaptation (institutionalizing distinctions with rules and procedures).
14. Data and space limitations preclude our focusing on race differences, although a similar argument could be made for racial minorities versus Whites. Indeed, there is a rich, developing literature examining the subtle workplace inequities people of color face. As more overt manifestations of racism have abated, 'symbolic (or new or modern) racism' remains. Researchers describe 'primitive, largely unconscious and automatic negative affects' and 'implicit or automatic prejudice' (Sears and Henry, 2003). Moreover, mechanisms that reproduce racial inequities: '(1) are increasingly covert, (2) are embedded in normal operations of institutions, (3) avoid direct racial terminology, and (4) are invisible to most Whites' (Bonilla-Silva, 1997: 476; see also Bonilla-Silva, 2003). A 'color-blind racism' has replaced the more overt 'Jim Crow' forms of prejudice.
15. 'Response latency methods' refer to evaluations of actions over which we have little personal control. Evaluations are estimated from the 'reaction time tasks that measure people's attitudes or beliefs indirectly (i.e., without asking people how they feel or think) . . . attention is focused not on the attitude object, but on performing an objective task, and attitudes are then inferred from systematic variations in task performance' (Rudman, 2004: 79). Such methods demonstrate the nonconscious association we typically make, for example, of men with science and women with liberal arts.
16. Sample IATs are available online to test implicit attitudes, about race, age, gender and science, and gender and careers, among others: [www.implicit.harvard.edu](http://www.implicit.harvard.edu). Some social psychologists have expressed reservations about whether such implicit attitudes really reflect individual attitudes, as opposed to simply reflecting societal stereotypes (Arkes and Tetlock, 2004; in response, see Banaji et al., 2004).
17. In his recent bestseller *Blink*, Malcolm Gladwell (2005) popularizes how nonconscious cognitive processes reproduce inequality. Several of his examples demonstrate how our 'adaptive unconscious' reproduces occupational sex segregation. One of Gladwell's more compelling examples refers to how sex bias affects recruitment to philharmonic orchestras, and how 'blinding' has successfully reduced such bias (pp. 245-51).
18. See Healy et al. (2005: 251) for a description of how centralized rule making may have actually enhanced the upward mobility of Turkish women into full professorships: Turkey has the largest percentage of female full professors of any of the 24 comparison EU countries.

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### 3. Cultural conflicts and commonalities: researching work–life balance for women university staff in the UK and Japan

**Diana Woodward\***

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#### INTRODUCTION

Two events of considerable personal significance will happen towards the end of this year, 2008, in which I am writing this piece. One of them is my imminent retirement from university employment. My working life, and much of my social life, has been spent in the world of higher education since escaping from the constraints of rural life at the age of 17 to go away to university. The other major event will be the demise of the Through the Glass Ceiling Network of women in higher education management, an organisation with which I have been closely involved since its formation.

Now, in its 18th year, the network will simultaneously come of age and become defunct. In its early years it provided peer support and access to expert knowledge for the first generation of women to reach university management positions in any number. At the time of its formation in 1990 very few women had ever headed a large UK higher education institution, and many of the first few female Deans and heads of department appointed felt isolated and in need of peer support (Glasner, 2005). However, in recent times the organisation has struggled to recruit and retain enough members to warrant employing professional administrators. Given the intensification of managerial roles in higher education, even committed members have been finding it ever harder to make the time to participate in its events, and also to get them funded as staff development. Some potential members undoubtedly now see it as self-indulgent or even irrelevant to meet as a women-only group, rejecting its ‘soft feminism’ ethos. Perhaps they have a point. In quantitative terms it is no longer as unusual to find women heading universities and colleges, or occupying senior management posts, as it was in Autumn 1987 when a woman colleague and I warranted a half-page photograph in the *Times Higher Education Supplement*

(the UK's weekly higher education newspaper) when we were appointed two of the five faculty Deans at our institution. However, whether the still rather modest numerical shift in the gender balance of university senior management has brought a commensurate change in organisational cultures and corporate values is less clear.

The final research project of my academic career, on which this chapter is based, is a qualitative study of work–life balance based on interviews with women employed in UK and Japanese universities as department heads, academics or senior administrators. It has provided an opportunity for me to reflect on my 40-year association with higher education, observing the changing place of women staff and students in the academy, assessing the impact of their growing representation, and raising questions about promoting workplace equality and the future for work–life balance. My enduring research interest, since my doctorate, has been in the status and experiences of women in tertiary education, in employment and leisure. Recent publications include a co-edited collection for *Through the Glass Ceiling of senior women academics' life stories* (David and Woodward, 1998) and a research-based guide to managing equal opportunities in higher education (Woodward and Ross, 2000).

Having completed the UK-based project (Woodward, 2007), where my informants and I largely shared a similar world, I wanted to extend it by comparing the experiences of the women heads of department in UK universities with those of women in an apparently similar work situation, but in a very different cultural setting. The obvious comparison was with women in management posts in Japanese universities and colleges. The nature and demands of these roles were likely to be broadly similar between the two countries. However, as a sociologist I expected to find that women's employment situation in Japan would be very different, as would gender relations within households, because of its notoriously workaholic and gender-segregated culture (Mouer and Kawanishi, 2005).

Like some other contributors to this volume, my research has often provided an opportunity to explore how others were coping with the same pressures that daily faced me. My preferred research method for small projects such as these is the unstructured interview, where informants 'tell you their stories' concerning a series of related topics. They are conducted woman-to-woman, rather than in the hierarchical expert-to-non-expert manner, with an implicit feminist-inspired assumption of shared experiences (Oakley, 1981; Maynard and Purvis, 1994; Few et al., 2003). The challenge, for the Japanese part of my study, lay in trying to establish the extent of our shared experiences and the differences between my informants' worlds and my own. I wanted to understand how they integrated the

various parts of their lives and their levels of satisfaction with whatever work–life balance they had established.

The substantive results of the Japanese part of this study will be published later. This chapter will explore the challenges of doing cross-cultural qualitative research into equality and diversity, based on this UK/Japan project. It concludes with an assessment of the scope to improve work–life balance for women (and men) in university employment in both countries through governments' and employers' policies and practices.

## WOMEN'S EMPLOYMENT IN THE UK AND JAPAN

Although women's labour force participation rates, especially mothers', have increased in both the UK and Japan since the Second World War, there are substantial differences between the two countries. Looking first at the UK, the labour market has been transformed in the past 20 years, with a dramatic increase in the proportion of women in paid employment, especially the mothers of young children (Taylor, 2002; Houston, 2005). By 2001, 72 per cent of women of working age were gainfully employed, including 57 per cent of the mothers with children aged under five (Dench et al., 2002). Due to the relatively weak statutory regulation of employment in the UK, British women have the second-highest rate of part-time employment in Europe after the Netherlands, whereas UK full-time workers (especially men) have the second-longest average weekly working hours (Crompton and Lyonette, 2006; Walby, 2007). This pattern is no accident, nor is it unaffected by gender. If one partner works long hours, someone else in the household has to take responsibility for providing domestic labour, or to manage the purchase of these services. This may also restrict their own working hours. However, part-time work in the UK is disproportionately low paid and low skilled, exacerbating labour market inequalities and undermining national productivity. For all sorts of reasons which appear rational or 'natural' within households, such as men's typically higher remuneration, gender segregation in the workplace and social norms about childcare, men are more likely than women to subscribe to the 'long working hours' culture and to prioritise their own career development.

Historically there has been scant state provision for working mothers and carers in the UK, but the election of the 'New Labour' government in 1997 made family policy an important part of the political agenda. Its objective of reducing child poverty has been pursued through efforts to increase parental employment rates, and providing allowances for childcare costs and cash benefits to low-paid parents (Crompton and Lyonette,

2006). Recent legislation has extended parents' employment rights, but often these merely provide the right to request flexible working arrangements (as opposed to a legal entitlement) and the provision for paid parental leave remains meagre in comparison with Scandinavia (Gallie, 2003). However, there are signs that growing numbers of employers are responding to the spirit of family-friendly legislation by offering more flexible working patterns and parental leave (Hayward et al., 2007).

Workers' age at retirement is expected to rise as a result of recent age-discrimination legislation and the upward adjustment of women's age of receiving a state pension from 60 to 65 years by 2020. As Walby points out (2007), this will increase women's labour force participation and also help alleviate female poverty in old age due to inadequate occupational pensions resulting from interrupted careers, part-time employment and low pay.

This legislation is part of a raft of new laws, government policies and quasi-governmental organisations established over the 30 years since the Sex Discrimination Act in 1976 to promote social equality and diversity. However, according to the Equal Opportunities Commission (2007), progress is 'painfully slow' with women still 'woefully under-represented' in national and local government, in company boardrooms and in senior posts within the law, the media, the civil service and the military. Ethnic minority women, according to the report, are still largely invisible in public life, and the pay gap between British men and women workers is one of the highest in Europe. The report blames the male-dominated culture of business and the professions for resisting flexible working practices, making it difficult for women to combine motherhood with the development of their career. Another recent survey found that progress towards gender equality in the division of domestic labour was stalling, even where both partners worked, possibly as a result of fathers' career ambitions and long working hours (Crompton et al., 2005).

Although the rhetoric of equality may not have been matched by achievements in the 30 years since the UK Equal Pay legislation of the 1970s, in Japan even public rhetoric is largely unrepentantly hostile to gender equality (McNicol, 2006). Historically Japanese society espoused, until the American Occupation after the Second World War, strongly held notions of filial duty with little regard for individual human rights, let alone women's rights or gender equality (Usui et al., 2003). Women only gained full political rights after the war. However, the dominant political party's policies and companies' employment practices remained firmly rooted in the ideology of 'good wife, wise mother', confining women to a secondary role in the labour market. A tightly organised cross-institutional male elite, coupled with a societal reluctance to criticise authority, hindered women's

capacity to challenge the status quo, even as the number of women graduates entering the labour market grew rapidly. However, many women only took two-year junior college programmes, and they were concentrated in arts disciplines (*ibid.*).

Thus although the expansion of the 1960s and early 1970s opened up higher education opportunities for many young women, it conferred little advantage in the job market as most companies openly recruited male graduates from four-year courses to become future executives, hiring women graduates from two-year courses as support staff. This only began to change by the late 1990s, when women's educational levels matched men's. Their rising qualifications, coupled with labour shortages and associated wage rises, and the fast growth of the Japanese service sector, gradually widened women graduates' employment prospects, providing a good economic return on the investment in their education (Tanaka and Johnson, 2008). However, many women still found themselves recruited to gender-segregated career tracks based on companies' assumption that it was not worth investing in their development as they would resign at marriage or childbirth (and, indeed, they commonly experienced pressure to do so).

Whereas the mothers of young children in the UK have contributed significantly to rising rates of female employment, Japanese women's employment rates show a distinct reduction around the age of 30. The reasons for their withdrawal from the labour market at this point seem to be a combination of factors. These include companies' conservative gendered policies about the careers of their employees (despite the Basic Law for a Gender-equal Society legislation of 1999), families' expectations, male partners' extremely high levels of commitment to their own career and their long working hours, and the low levels of state childcare and eldercare provision. In Japan 80 per cent of male employees and half of all female employees work over 40 hours per week (OECD, 2003). In the UK there has been a slight fall recently in the proportion of men working over 45 hours per week from 39 per cent in 1997 to 31 per cent in 2005. The comparable fall for women was from 11 to 10 per cent (Walby, 2007).

This situation does seem to be changing somewhat, but not necessarily in a direction conducive to economic development. Young people in both countries are deferring marriage and childbearing. In Japan the fertility rate has fallen to a record low (OECD, 2003; Tanaka and Johnson, 2008). Women graduates seem to find marriage and motherhood increasingly unattractive, and the rising divorce rate can make financial dependence on a 'corporate warrior' who works all hours a risky option (Usui et al., 2003). Various sources suggest that Japanese parents find it harder to combine employment with childcare than do parents in other countries.



The gender wage gap is twice the OECD average and employees' access to flexible working hours, part-time employment and return-to-work schemes is relatively poor.

Recent legislation has established the principle of equal opportunity in employment and permits parents of either sex to stay at home during their child's first year, but this has had negligible impact on Japan's heavily patriarchal organisational cultures and practices. In 2003, Japan was ranked 97th out of 126 countries for women's representation in its national parliament. In 1995, only 9 per cent of its managers were female (compared with 43 per cent in the US) and only 0.3 per cent of company board members were. Usui et al. identify systematic overt discrimination by managers against women as the reason for this under-representation, based on stereotyped assumptions about women's ambition and commitment to their career, a lack of role models and barriers holding back women's access to leadership positions. The long working hours culture and the poor representation of women (3.5 per cent) in management-track careers hold little promise of any significant imminent shift in workplace practices.

## HIGHER EDUCATION IN THE UK AND JAPAN

In Japan, as in the UK, almost half of all school-leavers enter higher education. With a current population of 128 million, there are 745 universities. Of these, 87 are prestigious 'national' universities, 76 are funded by regional governments and 582 are private institutions, many of which are regarded as lower in status than the national or regional universities (*The Times Higher*, 2 November 2007; *Education Guardian*, 15 January 2008). This is the second-largest higher education system after the United States (McNeill, 2007). In the UK there are about 130 universities and 47 higher education colleges, for a population half the size of Japan's. The Japanese government encouraged rapid growth in the sector in the 1990s and early 2000s, permitting many colleges to acquire university status despite the evidence of looming major problems in student recruitment arising from years of falling birth rates. Some 90 per cent of Japanese higher education entrants are school-leavers, unlike in the UK, where only half of university students are. In Japan this age cohort has fallen from 2.05 million in 1992 to 1.3 million in 2007, and is predicted to fall to 1.18 million in 2012 – a decrease of over 40 per cent in 20 years. The less well-regarded universities have already seen dramatic falls in their student recruitment, obliging them to become less selective as students are able to trade up to more prestigious institutions. This has been particularly damaging for the private

universities. Because most of their income comes largely from student fees, and they have struggled to fill their government-authorised student places recently, large-scale institutional closures and mergers are seen as inevitable. Over a third of those offering two-year (sub-degree level) programmes failed to cover their annual operating costs from income in 2003, as did a quarter of those providing four-year programmes.

Meanwhile academic staff recruitment has almost ceased. Even the high-status research universities, which have been more successful in maintaining student recruitment, are struggling to cope with government cuts in staffing budgets, leading to freezes on the recruitment of new staff and internal promotions (*The Times Higher*, 2 November 2007).

The UK also faces a substantial decline of about 120,000 in the number of 18-year-olds between 2009 and 2019, but its impact on universities will be far less cataclysmic than in Japan because of the greater diversity of its student population. It will be compensated for, to a variable extent between institutions, by the recruitment of mature students, especially lifelong learners (many of them studying part-time and/or at a distance), and international students from the European Union, the Middle East, the Indian sub-continent and the Far East. The notion of actively recruiting international students is almost unknown in Japan, where only 1.6 per cent of the undergraduate population and 11.7 per cent of postgraduates are foreign nationals (*The Times Higher*, 2 November 2007; OECD, 2008). The role of the government has been to provide planning frameworks, evaluation and accreditation mechanisms, rather than using fiscal measures to promote change within higher education, as in the UK.

The gendered employment patterns described earlier apply also to the higher education labour market in both countries. The shift from an elite to a mass system of higher education has expanded the number of staff employed. In 2005/06, 165,000 academics were employed in UK higher education, 96,000 of them male and 69,000 female, representing a 20 per cent increase in the preceding decade (data from the Higher Education Statistics Agency website). Japanese universities also have 168,000 academic staff and 189,000 non-academic staff, despite the higher number of institutions. Although the proportion of women full-time academics in the UK grew to 36.5 per cent in 2005/06, women still comprised only 16 per cent of the professoriate in England (*The Times Higher*, 19 January 2008). A quarter of male academics but only 9 per cent of women earned over £50,000 per year, with an average gap of £3,800 between the median salaries for male and female staff (*The Times Higher*, 21 December 2007). There are major differences in the gender profile of staff, especially at professorial level, between disciplines and between universities which is associated with these salary differentials.

It is hard to find comparable data about Japanese higher education institutions. Women comprised 14.1 per cent of higher education teachers in 2001, far lower than most other advanced societies, and only 7 per cent of the teaching staff at the prestigious national universities (Usui et al., 2003). Some 14 per cent of junior college principals and 8 per cent of university heads were female, including one solitary female head among the 87 national universities (McNeill, 2007). I have not been able to find data about the gender of professors, partly because of the disparate nature of the sector and also because Japanese higher education uses the American system of calling all academics 'professors'. Some informants told me that promotion to full professor is more a matter of long service and being nominated by the head of department, rather than being a meritocratic promotion, as in the UK.

## CONDUCTING SOCIAL RESEARCH IN CONTRASTING CULTURES

Academic employment in the UK has traditionally provided more flexibility and autonomy than many professional careers, but this can mean weak boundaries between work-time and personal time, and open-ended expectations. Bryson (2004), reviewing various surveys of academic employment, identifies a set of trends which include work intensification and overload, reduced autonomy, declining collegiality and managerialism. The interviewees from the UK part of my study, who were managers of academic or support departments in 'modern' universities, reported heavy, often unpredictable, workloads and long working hours. New technologies enable some activities to be done at home, such as e-mails and writing tasks, but generally this served to extend the working day rather than enabling them to spend whole days working at home. A key finding was the women's need to set temporal and spatial boundaries to contain work in order to preserve time for family life or personal leisure. This was especially true for those women with dependent children, who were unable to encroach on private time when work was especially onerous, as the child-free women could. Few women with families had their own study, so that work taken home had to be cleared away when done, marking a symbolic distinction before 'family leisure time' could start. The notion of work-life balance as being achievable by employers' promotion of flexible working patterns (as suggested in much of the work-life balance literature from government or human relations sources) was irrelevant for this group, who constantly had to juggle competing demands on their time.

Part of the reason for selecting Japan as a suitable research context for

this study was, in addition to the demographic and theoretical reasons explained earlier, my desire to have my own culture-bound assumptions shaken up. Although I had travelled widely, my journeys had always been for pleasure or to attend conferences, on short trips which rarely gave much insight into people's daily lives. I wanted to find out whether the experiences and expectations of the women managers I had interviewed in UK universities were shared by their counterparts in Japan. How far were these women's lives shaped by the shared exigencies of their work-roles, or were they more strongly influenced by cultural differences in norms and values about the relationship between work and their private lives? My initial contact with a Japanese academic proved to be not only crucial to the success of the project but also brought great personal pleasure. Dr Takeko Iinuma, from Senshu University in Greater Tokyo, had already collaborated on a research project at my own university on work–life balance from the social policy perspective. She was invaluable in initiating me into Japanese culture, helping me find accommodation in Tokyo, letting me use her work computer to do my e-mails and conducting interviews with non-English-speaking informants. We also enjoyed some sightseeing and meals together.

Before the visit I needed to make contact with prospective interviewees without having any personal contacts other than Takeko. I e-mailed all the UK contacts I could think of who may have contacts of their own in Japanese universities who either might volunteer to be interviewed or who could, in turn, put me in contact with their own networks of colleagues and friends. The profile of the Japanese women interviewed is not completely comparable with the UK informants. One selection criterion was that they had to be reasonably fluent in English, since I do not speak Japanese. (In the event Takeko conducted several interviews with non-English-speaking administrators on my behalf, some of which I attended.) I set a geographical limit on prospective informants, comprising Greater Tokyo and the Osaka–Kobe–Kyoto conurbation, for practical reasons. This did not appear to pose any difficulty or undue bias, since both are massive conurbations. I could not afford to be as selective as I had been in the UK. Over half of the interviewees were senior academics, managers and administrative heads but some were unpromoted or mid-career women academics. Although many informants spoke excellent English, often having studied in North America or the UK, at times I did have to simplify my questions which reduced the detail and richness of the responses.

One major problem was in the timing of my visit, which needed to happen when I could reasonably be away from my own job, when Takeko was available and when I could expect my informants to have time to meet me. The visit was planned for April/May, but as this began with the start

of the academic year and ended with Golden Week (which included three public holidays, when many organisations closed for the week), it proved very difficult to make firm plans until I got to Japan. Another difficulty lay in locating exactly where informants' universities were, establishing transport arrangements for getting there and knowing how to make best use of my time. Wikipedia was invaluable in providing local transport maps and guidance about travel times, but travelling around cities to appointments remained a challenge. Japanese public transport is amazingly efficient and well ordered, and city transport maps are readily available. However, even in Tokyo few station name-signs are in English characters, and buses posed an even bigger problem. Each transport system has its own arrangements about buying and using tickets, which tend to be non-transferable (at least for a short-term visitor like me). I often used taxis for the final stage of travelling to university campuses but even then few taxi drivers spoke or could read English, so I practised saying the name of my destination or had it written in Japanese to show them.

Thus with a huge amount of forward planning and with ample time allowed for each journey I managed to get around, albeit not wholly without cultural problems. The most embarrassing incident was at a private university where, just before an interview, I guessed wrongly and pressed the panic button instead of the toilet flush. I then had to explain my predicament to the young male lecturer who came to my aid!

Once I actually met my informants I found them, as I had expected, to be unfailingly helpful and eager to provide whatever help I needed. Many had studied in the US or the UK, and so spoke excellent English and understood the wider context of my enquiries. Where the women were less fluent in English the content of the interviews proved less informative, not surprisingly. Although they were eager to help me, their answers lacked the rich detail of elaboration on basic answers which are such a positive aspect of qualitative research. Also, I found it difficult to know what to make of their answers to my 'either . . . or . . .' questions, which were usually answered 'yes', confusingly, even when I tried to probe further. The non-English-speaking informants tended to be senior administrators, whose work roles gave them less flexibility than the academics had about when they had to be at work.

Many of the key findings from the Japanese study echoed those from the earlier UK study. Higher education management in both countries is becoming more demanding and challenging, and the pressures to be research-active seem to apply to all academic staff. Japanese universities' teaching styles seem to be what would be regarded in the UK as rather traditional. Class times are non-negotiable and some institutions operate all day on Saturdays. One day a week is set aside for meetings, but there

seemed to be little or no evening teaching. All academic staff were expected to be active in one or more discipline-based networks, which frequently required all-day participation at meetings in other cities at the weekend. As in the UK, much work was done at home during the evenings, at weekends, and on days when attendance at the university was not required. On balance, more Japanese interviewees stayed late at work. Overall, weekly working hours were probably similar but the Japanese women seem to take fewer and shorter holidays, often as short add-ons to academic conferences in other cities or abroad, in luxury hotels. Other short holidays, often in families, were trips to coastal or country resorts, often with hot springs.

The administrators, especially in small women's colleges, which often had a religious foundation, seemed to have especially challenging workloads. The financial pressures arising from falling student recruitment created the need to diversify functions and activities but without increasing the number of staff. Some administrators had been given major new responsibilities for which they were untrained and inexperienced, including heading the library, the careers service or the marketing and recruitment department. It was clearly unthinkable to refuse such requests, out of loyalty to the institution and its leaders. They also had less autonomy over their work than did the academic staff. The combination of being small, women-only historic institutions (often established by American missionaries in the late 19th century, based on the model of the American women's college), rooted in Christian values, exerted a quasi-sacred duty on the administrators to work extremely hard, not to fail and not to admit to defeat or ignorance. However, this created an extremely workaholic ethos leading to significant job stress and, in one case, a mental breakdown.

Many of the Japanese women I interviewed had partners and children. Some had chosen to remain single or lived very detached lives from their partners, because the academic job market is so difficult and to enable them to pursue their own career in a more single-minded way. Several married women interviewees, including those with children, had a husband who worked in a different city, often several hundred miles away, who was only at home from Saturday afternoon to Sunday evening. Even when they did live together, long working days and the male tradition of socialising after work (which seemed to be less common for academics than for business 'salarymen') restricted the time available for leisure as a couple or family. The invisible support which makes these arrangements tenable was often the woman's mother. She would collect children from nursery or school, feed them and do housework, especially laundry, to support her daughter. City supermarkets stay open late, and are often located near suburban

stations, making it easy for commuters to buy fresh ingredients for an evening meal on the way home from work.

At one prestigious university a group of women in one department explicitly supported each other, by mentoring younger colleagues and providing cover when domestic emergencies occurred. One said that she and her senior women colleagues advised younger colleagues to defer child-bearing, work hard on their research and teaching until they got promoted, and then they could afford to coast, cutting back on non-central commitments.

Conducting these interviews gave me a tantalising entrée to the women's lives and expectations. My main impressions were how hard they worked (but not necessarily, week by week, harder than their UK counterparts), but also how little opportunity their lives afforded for personal pleasure and relaxation. A pre-bedtime soak in the typical Japanese deep bathtub was a common ritual, and some women played the piano or watched television. Commuting was time-consuming, restricting social opportunities to the occasional meal or drinks straight after work. Few city homes had gardens, and open spaces such as parks were in short supply although trips to shrines and temple gardens provided a substitute in cities like Kyoto. Holidays were infrequent and short, and entertaining at home was uncommon as the expected standard of hospitality was too elaborate and demanding for busy women. My expectation for this project, that our common experiences would provide a basis for rapport, proved true. However, I was left wishing that I had the opportunity to explore more deeply how these women fitted together the disparate components of their lives in search of work–life balance.

## **MECHANISMS AND STRATEGIES FOR PROMOTING WORK–LIFE BALANCE IN ACADEMIA**

A raft of recent equality and diversity legislation in the UK has placed a series of duties and responsibilities upon employers, which has certainly influenced policies and discourses within universities' human resources departments. At UK level the government has merged the formerly separate equality organisations into one Equality and Human Rights Commission, and a single Equality Challenge Unit advises and cajoles universities. However, as pointed out earlier, tangible progress towards equality of employment within higher education remains pitifully slow, as measured by the proportion of women professors and Principals. Also, many would argue that this national political agenda in implementing new legislation and merging the various equality organisations, as reflected in

universities' own activities to address a diverse range of relevant attributes and beliefs, actually serves to deflect attention from gender inequality, which remains in quantitative terms the largest dimension of inequality.

Other forces are also at work. For example, the UK's four national legislatures are using their funding councils for higher education to steer universities to increase their consultancy, applied research and 'knowledge transfer' activities for business and industry, through rewarding the volume of such activity. Consequently most universities have redesignated their senior management post 'Vice Principal for Research and Commercialisation' or similar. The impact of this has been to virtually exclude women from such posts, as the requirement to have substantial experience of both research and industry is rare outside science, technology and computing – exactly those disciplines where senior women are in short supply because of historic patterns of gender segregation within all levels of education. Similarly, a recent study reveals the enduring under-representation of women in chairs of medicine – none out of 40 in one medical school and two out of 56 at another (reported in *The Times Higher*, 29 June 2007).

The evidence suggests that the position of women in university employment in Japan is even more strongly shaped by conservative stereotypes, and patronage in making senior appointments enables white middle-aged paternalists to continue to reproduce themselves in positions of power and influence. The language used by women in UK and Japanese universities to describe their experiences, and their recipes for change, are surprisingly similar. Taking quotes from some of the sources cited earlier, commentators from the UK say:

Women coming up the ranks have no role models.

There are role models for trainees and students, but more female chairs would be better.

I suspect there is subtle, unconscious discrimination here. I do not know anybody who feels discriminated against, but some do feel that life is perhaps made easier for their male colleagues.

Once you get more women in senior positions, the management style becomes more consultative and inclusive, and it does mean female academics have a better chance to progress.

Men [here] do not see themselves as responsible for home life. Promotion for women would entail too many demands, not enough time and no support. Women are not prepared to wing it as men do.



[The predominance of] men who have spent so little time with their children they have no concept of what is involved [has created a culture in academic life that is] incompatible with normality.

Their counterparts in Japan say:

What sort of role models are young women getting? They're in the highest level of education, and they see that management is all staffed by men. It is not nice.

Only 17 per cent of our staff is female, and we have some faculties with no women at all. We are working very hard to improve the ratio of female to male professors.

Most professors select male students when considering a research successor. They subconsciously think 'Oh, if I choose a woman she'll just get married and have children'.

In both countries the recommendations for change range from government action and even setting quotas, through positive action at the organisational level in appointments and promotions using gender-balanced shortlists, through to individual interventions such as coaching, mentoring and personal development programmes for women. At my own university the Dean of one faculty has established a social and peer-support network for women academics, students and researchers in science, technology and computing. A more intractable challenge is shifting the long-working-hours culture, which is clearly so inimical to the interest of women academics with children, in cultures where there is still an unequal division of domestic labour and childcare provision is in short supply and/or expensive. This is not going to be easy, given the highly competitive nature of higher education careers and institutions' needs for ever-greater efficiency from its staff. The introduction of more flexible forms of contract may enable women to pursue the development of their career after childbirth (and, increasingly, alongside eldercare), but it risks segregating slow-track mothers' careers from fast-track men's and child-free women's. There is some suggestion that 'family-friendly' employment practices are not taken up by men who are highly committed to their career or where work pressures make it difficult (Crompton et al., 2005).

The challenge for higher education in both countries in the early 21st century is, therefore, to improve the representation of women at senior levels, and alongside this, to try and effect more human, saner ways to reconcile the demands of 'home' and 'work'. Leaving the last word to Mitiko Go, the first and only woman president among Japan's 87 elite

national universities: ‘We don’t have the luxury of ignoring half of the population. We need to get serious’ (quoted in McNeill, 2007).

## NOTE

- \* The author gratefully acknowledges the financial support received from the Daiwa Anglo-Japanese Foundation and the Carnegie Trust for the Universities of Scotland, to support the data collection in Japan.

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## 4. The unwanted body of man or why is it so difficult for women to make it in academe? A feminist psychoanalytic approach

**Marianna Fotaki**

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Sexual difference is one of the most important questions of our age, if not in fact the burning issue. According to Heidegger, each age is preoccupied with one thing and one alone. Sexual difference is probably that issue in our own age which could be our salvation on intellectual level.

(Irigaray, 1993: 5)

Why is there a male in the fe(male) and a man in a wo(man)? The male is a thing of its own and the female has a male in it. Does it mean that a woman is another mutation of the man?

(A question my 11-year-old daughter asked me in 2007)

### INTRODUCTION

The last decades have witnessed a massive entry of women into professions including law, medicine, accounting, consultancy and academe in many industrialised countries (Equal Opportunities Commission, 2006; WEF, 2006; Fincham and Rhodes, 2005: 630). Although horizontal and vertical discrimination is present in many of those professions, the inequality in pay, working hours, career prospects and treatment of women is perhaps nowhere as evident as in academe (Long et al., 1993; Martin, 1994; Long and Fox, 1995; Fox, 2001, 2005; Bailyn, 2003; Knights and Richards, 2003; Reskin, 2003; Probert, 2005). While the percentage of female graduates is in many cases higher than that of men (for example, in 2005/06, 57 per cent of first degree graduates in the UK were women; see Dyhouse, 2006), fewer women decide to follow a research career in science (including social sciences) and yet significantly fewer make it into the top positions in their chosen fields (Bowling and Martin, 1985; MIT, 1999; AUT, 2004; Leahy, 2006; WiL Project, 2006). As women disappear from academia just like

water seeping out of a pipe (Bailyn, 2003: 149), women are significantly underrepresented in senior academic ranks in both social and/or natural sciences, which positions universities among the most male-dominated and women-unfriendly places to work. This is particularly so for prestigious research-driven universities across the European Union, Northern America and Australia despite some existing differences between individual countries (for example, Scandinavian societies are historically more egalitarian). These differences should not however, obscure the overall picture characterised by what the World Economic Forum report has described as a significant and persisting gender gap in many industrialised countries in Europe (including France and Italy, for example), when measured in terms of an overall Gender Gap Index (WEF, 2006: 9). This is particularly true for academe, where even Sweden with the best overall score in reducing the gender gap, shows a relative underperformance in educational attainment and equality of opportunity for women (*ibid.*). Research confirms that the Swedish academic world is very male dominated at the top and even at the medium level (Elg and Jonnergård, 2003).

There are many hypotheses and explanations as to the reasons for this persistent gender bias and discrimination of women in academia which 'has continued to be sustained despite institutional conditions in which it should have been precluded' (Knights and Richards, 2003: 214). Sociologists and sociologist feminists have sought to explain these differences by incorporating primarily institutional-level factors, and their interaction with social structures as primary reasons for disabling progression of women in academe (Long et al., 1993; Fox, 2001, 2005; Bailyn, 2003; Reskin, 2003; Probert, 2005; Leahy, 2006; Winchester et al., 2006). For example Long et al. (1993) show that about one half of sex difference in academic promotions is attributable to differences in variables affecting the process, such as the quantity but not the quality of publications, while Leahy (2006) points at the lesser specialisation by women scientists as a missing link explaining this outcome. Other researchers look at the factors outside institutional structures which are interlinked with gender and productivity, such as family characteristics. Fox (2005) has demonstrated that these are complex considerations that go beyond being married or not married, and the presence or absence of children. The research based on the national survey from prestigious Australian universities concluded that discrimination or bias in appointments, promotions and workloads were not significant in explaining men's domination of the senior levels, pointing to particular explanations such as the higher rates of separation and divorce among men than women and the impact of older children's needs (Probert, 2005). These findings are indirectly confirmed by Winchester et al. (2006) who claim that the underrepresentation of senior

women in Australian universities is not a result of poor policy or erratic implementation, but is a deep-seated cultural issue requiring cultural and generational change. Baily (2003) concurs with these findings by stressing the nature of the rules that disadvantage choices outside professional life which need to be questioned to achieve a true equality.

Although the existing research into inequality and discrimination of women in academe has illuminated some important institutional and structural aspects, there are equally or perhaps even more important issues that are unexplored and left untheorised. There is, for example, an absence of links to the elaborate body of feminist research which draws on various strands of post-modernist thinking including symbolism and post-structuralism (the influence of Michel Foucault's work springs to mind; see Diamond and Quinby, 1988, for example) with its focus on the insidious nature of power relations. Even more troubling is the gap between the 'institutional/structural' sociological research and the work of feminists and gender theorists who have used psychoanalysis to question the foundations of a socio-symbolic order replete with phallic metaphors and male imagery, and its implied compulsory heterosexuality for women (and men) that Judith Butler has forcefully and most famously denounced (1997, 2000, 2004). As a result, the body of knowledge on institutional barriers produced by sociologists, and the feminist research illuminating the psychic origins of social structures, remain isolated from each other and there is no intersection or cross-fertilisation between them in theorising about inequality of women in academic institutions. There are only a few studies on the subject, mostly conducted by female and/or feminist researchers (for example, see Alvesson and Billing, 1992; Martin, 1994; Benschop and Brouns, 2003; Knights and Richards, 2003; Townsley, 2003), which have looked at various aspects of gender inequality in academe other than those examined by sociologists, described above. Martin (1994), for example, demonstrates the interdependent relationship between the socially constructed notion of sex and the gendering of organisation, while Benschop and Brouns (2003) examine how the structural, cultural and procedural arrangements of academic organising constitute gender relations with focus on the social construction of scientific quality. Knights and Richards (2003) argue that the system of meritocracy upon which appointment and promotion within academe are based, reinforces inequality as it reflects and reproduces the discursive practices of masculinity that present disadvantages to a majority of women and some men. In order to better comprehend the gender bias and conflicts in organisations, Alvesson and Billing (1992) suggest a differentiated understanding of gender relations based on an organisational symbolism approach. Townsley (2003), on the other hand, argues for moving beyond simple body counting towards

considering the variety of historical, social, economic and material factors influencing women's experience.

However, despite these references and the Special Issue of *Gender, Work and Organization* (10(2), 2003), a vast body of relevant literature in cultural studies is omitted from studies of gender inequality in universities including anthropology, philosophy and more recently post-modernist theories. Ely and Padavic (2007) have recently argued that rich feminist work exploring complex interactions between gender, identity and power has been underutilised in gender research perspectives in organisation studies. Even when feminist work and post-modernist insights are used to define organisational scholarship it often comes out as a literature that has been primarily 'written by men for men and about men' (Calás and Smircich, 1996: 216). This is because they have not been extended to theorising about woman's symbolic representation (or the lack of it) in terms of discursive and signifying systems (Grosz, 1990: 22) in academe and the implications this has for the constitution of academic knowledge. However, as power operates at a conscious as well as an unconscious level, and as discrimination is often tacit and rationalised post hoc, I contend that there is a need to consider this knowledge production process as an intrinsic and a foundational part of the socio-symbolic and imaginary order. Both ideas are derived from the psychoanalytic theory of Jacques Lacan (2004) and can be usefully employed to understand the symbolic representation of such knowledge. Foucault has also shown that what is regarded as knowledge is bound up with power which is bound up with knowledge (Foucault, 1981). In Foucauldian terms, universities are important sites in the definition of what is regarded as knowledge. Explorations of the position of women in universities should therefore tell us more about the power/knowledge relationship, or rather how knowledge comes to be defined as such. Furthermore, exploring constructions of power/knowledge will illuminate better important aspects of the genesis of, and dynamics behind, women's unequal position in academe. But as there is no research linking insights gained from applying various theoretical frameworks and methods, this remains a relatively unexplored area while important aspects about the genesis and dynamics behind women's unequal position in academe are mis/understood.

Using feminist psychoanalytic theory, and more specifically Luce Irigaray's work, I propose to address this gap by considering this inequality and discrimination of women in academia as a foreseeable consequence of woman's absence from the socio-symbolic space and her non/in/signification in the body of knowledge that is thereby produced. Irigaray perhaps provides the best conceptualisation and account of how this lack originates in the phallogocentric discourse which stands for the

universal system meant to represent both women and men (Irigaray, 1991, 1993). My theoretical framework is informed by Irigaray's (1991) concept of 'woman' as a socio-symbolic category and the archetypal other that is defined by her lack in relation to man, against whom he then is able to define himself. This is not to imply any disregard of the very real differences of class, ethnicity, religion or sexual orientation, which contextualise and separate women's experiences. Nor is it to deny differences between individual women or groups of women. I shall use it as a conceptual device to think through the implications of this symbolic and imaginary conception of 'woman' when she partakes in the knowledge production process. The arguments presented in this chapter are about the consequences of denying woman's own signification that language and the male scientific discourse confer upon female researchers engaged in knowledge construction.

The remainder of the chapter is organised as follows. First, I shall outline the key premises of my analytic framework and argue about the importance of the imaginary and symbolic aspects of our social reality and the knowledge production process in academia. I shall then discuss the implications of the feminist psychoanalytic framework proposed for addressing the issue of discrimination of women in the university in the following section.

## THE UNSYMBOLISED WOMAN AND THE POWER OF KNOWLEDGE

In explaining the causes of exclusion of women from knowledge production, I shall draw on two main bodies of broadly defined post-modernist theories to build my framework: on the feminist psychoanalytic approach which questions the position assigned to woman in the symbolic phallic order that Irigaray has best articulated in her work (Irigaray, 1985, 1991, 1993), and on Michel Foucault's conceptualisation of power (1980, 1981). I shall use some of Foucault's ideas on the mutually constituting knowledge/power relation as a springboard for my analysis despite the uneasy relation between his work and feminism (Diamond and Quinby, 1988) while relying on the core tenets of Freudian and Lacanian psychoanalysis, notwithstanding its even more troubled relation with feminism and/or gender studies. I shall do so for two reasons. First, I agree with Juliet Mitchell's (1974 [2000]) view about the importance of psychoanalytic contribution to women's liberation outweighing the support it has rendered to constructing the patriarchal symbolic order. Crucially, by bringing forward the importance of the unconscious mental life and the



existence of infantile sexuality, psychoanalysis enabled us to conceive of gender as a non-biological category; a fluid state attained via psychosocial development. In doing so, psychoanalysis also gives us tools enabling us to dismantle the patriarchal order, as Irigaray has done in denouncing the sole representation of women in relation to, and through, male discourse. Second, in order to explain the positioning of women in universities, I use Lacanian theory to argue that social reality is structured in phantasy. Nevertheless, it cannot be denied that psychoanalysis, being a product of this discourse, has legitimated in a powerful way and sustained the symbolic order that privileges patriarchy. The Freudian association of the female body with the uncanny or the unhomely place (*Das Unheimlich*) – the negative and the death itself (Freud, 1919) – has been continued differently in Lacan's rereading of his work, particularly in his conceptions of woman as the phallus; which in effect de-voids woman of her own non-phallic substance and power. Therefore I shall also use the psychoanalytic concepts to turn against the means that psychoanalysis has itself applied to exclude women from language, knowledge and power by denying them symbolisation, and by considering them as the unwanted body of men who pursue sublime theory and science, as Irigaray (1991) persuasively argues.

Irigaray takes Lacan's key tenets of the symbolic which is intertwined with the imaginary, to theorise on the position of woman in the social order in which we live including the unconscious phantasies of the dominant discourse of philosophy and science, and their significations in the symbolic order. In so doing she confronts the implications of Lacan's work and in particular she stresses the power of the symbolic order over woman's (lack of) representation in science, culture and philosophy. And it is this order that she is primarily concerned to expose. By stressing the power of this patriarchal symbolic order in language, science and philosophy, Irigaray turns against the uncritical discourse of psychoanalysis to confront the way in which the theory itself reproduces the structure of sexual difference and deploys it for the purpose of male identity formation (and the definition of female identity as its corollary), resulting in the imposition of the heterosexual matrix and therefore in sexual/political domination over women and some men. By offering her lucid exposition of the habitual relegation of the feminine to the position of matter, material or object against which the masculine defines itself in the tradition of Western thought (Irigaray, 1985), she has greatly contributed to unearthing the importance of phantasmatic foundations in understanding the social position of woman. This contribution positions Irigaray as one of the most important post-Lacanian theorists who in recognising symbolic constructions of gender and their social, cultural and linguistic dimensions has taken account of its imaginary foundations in order to expose and

dismantle their patriarchal bases (Whitford, 1991). As Whitford poignantly and pointedly argues, Irigaray's project is much wider in scope in that it aims to expose the foundations of metaphysics and its discourse in Western thought which enables and conditions 'the dereliction of woman' (Irigaray, 1985). Irigaray contends that this is being achieved through applying the phallogocentric discourse (a neologism coined by Jacques Derrida to refer to the privileging of the masculine/phallus discourse in the construction of meaning) as universal to all (both women and men).

In *The Sex That Is Not One* (1985), Irigaray has articulated her theory on the importance of sexual difference by pointing out the means of devaluing and making woman in/significant: (i) woman is absent from the socio-symbolic space as she is not defined in her own right but in relation to man; (ii) the history of Western thought is articulated in terms of a male discourse; and (iii) woman is equated with nature and unwanted man's body. The absence of adequate linguistic, social, iconic, theoretical, mythical, religious and abstract scientific symbols for woman 'by which to represent herself' (ibid.) and the consequence this has for treatment of woman is therefore laid bare. Irigaray posits that the denigration of women will not cease without restoring this relation as another, equivalent way of being for woman and without finding new ways of expressing and symbolising the sexual difference which she conceives of primarily in its metaphysical dimension, in *An Ethics of Sexual Difference* (Irigaray, 1993). I bring these ideas forward to argue that we need to bring back the socio-symbolic and phantasmatic dimensions to our thinking about causality behind women's mis/treatment in academe. At present the neglect and disconnection between psychical reality and the social world has resulted in little or no consideration being given to the placing of woman outside language 'except for masculine forms of representation' (Braidotti, 1991: 223), and how this exile from the symbolic might have affected her position in the university and her contribution to knowledge.

Let me now turn to how the absence of this symbolic representation of woman plays out in the context of the university, occupying a central position in the process of construction and re/production of the symbolic space in the Foucauldian sense of power producing knowledge and knowledge being a source of power (Foucault, 1981). For Foucault 'power is the desire to know' and both are intimately related with discipline and control (Townley, 1993: 521). Foucault exposed the workings of disciplinary power entailed in the categorisation and classification aiming to render individuals knowable and governable (Foucault, 1977). Yet power for Foucault was relational and became apparent when it was exercised through discourse (Townley, 1993). Therefore his work is particularly useful to analyse historically and discursively specific ways in

which woman has figured as constitutive absence (Martin, 1988). Martin writes (1988: 16): ‘to totalize or to universalize Otherness as an answer to the question of woman is to leave ourselves with no possibility for understanding or intervening in the process through which meaning is produced, distributed, and transformed in relation to shifting articulation of power in our world’. I posit that in order to consider power implications of the so conceived and perpetuated socio-symbolic order, it is important to take at least a glimpse into the position from which women academics contribute to knowledge creation, and how this positioning of female academic body (and the position of this knowledge) is managed within the structure of a university. Mary Frank Fox writes (2001: 654): ‘In the study of gender and society, science is a strategic analytic research site – because of the hierarchical nature of gendered relations, generally, and the hierarchy of science, particularly. Academic science, especially, is crucial to, and revealing of, status in science and society’.

In the next section I discuss the implications for addressing the issue of discrimination of women in academia in the light of the alternative analytic framework proposed.

## THE UNWANTED BODY OF MAN AND THE POSITION OF WOMEN IN ACADEME

The underrepresentation of women at the top of the academy is according to Benschop and Brouns (2003: 194): ‘a persistent and fascinating issue mostly analyzed as a result of women’s choices or as an issue of personnel management’. Sociological research stresses the importance of institutional conditions in precluding discrimination; yet the research spreading from Australia (Probert, 2005; Winchester et al., 2006) to Scandinavia (Elg and Jonnergård, 2003; Falkenberg, 2003) demonstrates that this may not be a sufficient condition to preclude gender bias, and to prevent underrepresentation of women in academe. Krefling (2003) claims that gender stereotypes are ideological and prescriptive rather than simply descriptive; thus their influence on academic employment processes is unlikely to diminish simply with the passage of time or accumulating evidence on women’s capabilities. Clearly there is a need for drawing on a variety of different paradigms to provide an explanatory framework in line with Townsley’s exhortations: ‘to recognize the epistemological interconnections that traverse gendered organization studies, as well as the geographical, socio-political, and ideological interconnections that constitute new global, gendered organizational interconnections that constitute new global, gendered organizational arrangements’ (Townsley, 2003: 634).

So what are the implications of the proposed framework for breaking through the symbolic deadlock if any, and for improving the lot of female researchers in academe?

What I am suggesting is that there is a necessity to understand how woman's positioning as an inferior and a 'lesser man' in socio-political and knowledge structures originates in her absence from the symbolic space in the first place (Oseen, 1997), which is a product of the societies concerned and not a biological fact. The consequences of this absence of female voice and of the loss that comes with it have been stressed already in Virginia Woolf's 'Shakespeare's Sister' recently reprinted by *The Guardian* (2007), where Woolf was passionately arguing why under the existing socio-symbolic order 'it would have been impossible, completely and entirely, for any woman to have written the plays of Shakespeare in the age of Shakespeare'. Martin captures the transhistorical power/less/ness this order implies for women by applying a Foucauldian lens to thinking about their position in science, culture and thought:

Woman has been situated very differently in respect to the 'human,' to 'Man,' than has man; and feminist analyses demonstrate ever more convincingly that woman's silence and exclusion from struggles over representation have been the condition of possibility of humanist thought: the position of woman has indeed been that of an internal exclusion within Western culture, a particularly well-suited point from which to expose the workings of power in the will to truth and identity. (Martin, 1988: 13)

If we were to transpose these statements to the contemporary university settings and to express them in Irigarean terms, it would then be more exact to say that woman finds it difficult to place herself in academe because she has been unrepresented and unsymbolised throughout the history of Western thought and culture. As a result, the only way that a woman can speak is through the male voice. Foucault has also shown that what is regarded as knowledge is bound up with power which is bound up with knowledge. Science and knowledge thus remains highly restricted because of the bounds within which it must work. The fact that women have no language of their own is also to do with the way the fundamentals of knowledge operate by bringing things/meanings into existence or obliterating them by the very act of classifying and naming them, even if it is only a definition by ascription (as it almost always is). This system of knowledge is nonetheless used for the purposes of domination by fixing the defined subjects in the so-established power relations as Foucault has demonstrated (Foucault, 1980). Of course the power exerted by 'knowledge' is at the same time sustained and reproduced by the subject herself. As Butler demonstrates, subjection is the power assumed by the subject as

an instrument of its becoming-ness and the condition of possibility for its agency (Butler, 1997: 11). This is the position that women in academe find themselves in. So if a woman is defined as the matter, the maternal and the (hetero)sexual body with limited or no capacity to think analytically, with weaker mathematical skills (as the Larry Summers affair circa 2005 demonstrates; see Summers, 2005), and peripheral contribution to philosophy (which literally means the love of wisdom/knowledge in Greek) and science (*episteme* – the verb *epistamai* in Greek means to know) – what choice is woman left with if she wants to succeed in academia? She can either mimic the male voice to become better at his own game or drop out of the game altogether and become silenced, exiled and marginalised. Either way it has little to do with who she is but to ensure that she *does* become marginalised.

However, as Brennan (1989: 1) argues: ‘thinking about these issues is deadlocked, of late, because their specific political *or* psychoanalytic contexts have been neglected’. Whitford concurs with this view by referring to Irigaray’s assertion that ‘one cannot hope to change easily symbolic meanings because they have imaginary foundations, which persist despite material changes’ (Whitford, 1991: 122). I also argue that this is a necessary precondition before we can begin to understand how to reconcile what Townsley (2003: 635) describes as: ‘the fragmented range of sexual, ethnic, national and classed’ subjectivities. For this to happen, a wide range of theories which are omitted in theorising about woman’s (impaired) position as the co-creator of symbolic meanings will have to be brought together. There is a wealth of other psychoanalytically informed theorisation on gender, which could be creatively used to inform our research on the persistence of women discrimination in academe. For example, the work of another contemporary post-Lacanian psychoanalyst, Julia Kristeva, who by contrast focuses on the significance of the maternal and pre-oedipal (signifying the pre-lingual and therefore pre-social) in the constitution of subjectivity and the role of the symbolic order in this subjectivisation (Kristeva, 1991, 1995), or the work of queer theorist Judith Butler evoking the idea of the unstable sexual identity in the unconscious, to oppose the equation of the sexual with biological or social identity (Butler, 1999, 2004). There are many insightful analyses of Irigaray’s and Kristeva’s work on the symbolic, which defines the role of human beings in the world and whether and how far this is equated with the patriarchal structure in relation to the feminine and maternal by feminist researchers (Grosz, 1986; Moi, 1986; Braidotti, 1991; Whitford, 1991; Oseen, 1997). And there is also an increasing number of researchers questioning the implications of the symbolic heterosexual matrix inaugurated by Butler for organisational change management (Kenny, 2009), institutional theory (Prasad, 2007)

and for women who enter the workforce *en masse* crossing their assigned gender roles (Harding, forthcoming).

All these could and should be integrated into conceptualisations about woman's absence of representation in her own terms, and her role as the lesser outsider and the other that she is assigned in the process of knowledge production as well as the implications for the body of knowledge so created. I argue that it is only by considering the direct implications of woman's symbolic positioning in the process of constructing *episteme*, that it becomes clear why the travails to legitimise our voice in institutions fail so often. And we may then understand why and how, at best, the 'honorary male' (Kanter, 1977) role is the only one we are allowed to assume, and why is our position always contestable and (therefore) frequently contested. Thus woman's claim to the co-production of 'universal' knowledge produced in the universities is an attempt to redefine the symbolic structure. It is therefore going beyond the politics of fairness and equality, but engaging with, and challenging, the less conscious perceptions and phantasies touching upon identity issues and anxieties of survival. This is also because the engagement in the university is then (rightly so) perceived to re-present a woman's attempt to transcend the role that is assigned to her: that of a sexual and maternal body, and to define it on her own terms outside the rules of the symbolic order which does not represent her. By considering the underrepresentation of women in senior positions in the university in the light of the framework proposed, we can perhaps start to appreciate the ramifications of woman's exclusion from the history of thought, and their impact on her position in an intensely competitive, highly subjective and inward-looking valuation system, all of which are attributes of academe. This positioning of woman in a 'foreign' body evokes uneasiness and hostility.

However, discrimination and unfair treatment of the female workforce is increasingly seen to be an undesirable phenomenon not only by feminists or critical social theorists but also by liberal economists who are concerned with the impact of equal opportunities on efficiency. Quoting Inghelhart and Norris (2003: 64) and their findings from a study using a World Values survey, Lull (2007: 116) argues that it is the culture's degree of gender equality and sexual liberation not its democratic politics that 'proves time and again to be the most reliable indicator of how strongly that society supports [the] principle of tolerance and egalitarianism', which he then suggests will lead to economic development (*ibid.*). Critical social movements on the other hand, are driven by ethical and political demands for creating humane organisations underpinned by the notion of social justice, and are generally more concerned with the detrimental effects of inequalities. Part of this drive leads also to redefining the notion

of in/equality which stands for ‘the unmarked norm or the measure of full human development’ (WEF Report, 2006: 1) to which women have to aspire if they are seeking equality. Therefore variations from this norm suggest female deficiency or ‘lack’ (Homann et al., 2007: 64). However these diverse preoccupations with the effects of gender and inequality also mean that the debate about the equal treatment of women in society will not wither away. With women entering the workforce in increased numbers and traversing the proscribed gender roles, even if they are products of male discourse, this issue is likely to become ever-more central, confirming Irigaray’s predictions. There is an urgent need therefore to move beyond essentialising women’s approaches, motivations and values, which are then employed either to explain away the status quo or to advocate for accommodating this difference, and beyond focusing on structural barriers of patriarchy centred on women’s commitments outside work. Pressing for institutional conditions to preclude discrimination, although very important, will not eradicate them on its own.

Surely, we cannot expect it either to happen via exhortation for adopting a collaborative and an empathetic style of working which is conventionally thought to be associated with feminine traits (Fondas, 1997). This is because these ‘soft’ characteristics are only valuable as long as they are not associated with women and as long as they remain in the male domain; otherwise they become rapidly devalued (Wajcman, 1996). The requisite shift will only come by allowing for the definition of woman as other than a non-man (Braidotti, 1991: 91), and by refusing her role as the eternal other in the imaginary/symbolic system established through centuries of patriarchal thought as Irigaray does (*ibid.*: 99), and by shifting from the material power to the materiality of the body power. This means that women (and men) will be able to determine their own representations beyond the compulsory matrices: heterosexual or otherwise opening up a space for creating new symbols (of knowledge) which would enable rather than restrict various avenues and possibilities for being and expressing themselves in and outside academia.

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## PART II

### Reframing equality, diversity and inclusion



## 5. Positioning workplace diversity: critical aspects for theory

**Judith K. Pringle**

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### INTRODUCTION

Workplace diversity theorising has been characterised by an incomplete and partial view. The atheoretical nature of workplace diversity (Pringle et al., 2006) has dogged the field with few explanations or even frameworks that allow for a comprehensive view inclusive of national locale, organisation and individuals. The focus has been on organisations, and the relational dynamics *within* them. The focus on the organisational level has had the unintended consequence of creating the appearance of a unified diversity discourse. As Jones et al. (2000) pointed out, what is framed as ‘global’ diversity discourse is more likely to arise from the experiences of workplace dynamics in large organisations from Western countries positioned at the ‘centre’ of academic discourse namely the United States (US) and to a lesser extent Britain. Local scholars have gone so far as to suggest that the term ‘managing diversity’ is a US term (Jones and Stablein, 2006) that advances a ‘globalising capitalist economy’ (Humphries and Grice, 1995).

Thus any broader discussion of workplace diversity has emphasised a global commonality framed within an economic imperative signified by the ‘business case’. The business case places the rationale for implementing diversity in the workplace on economic outcomes and omits consideration of equity arguments or a redistribution of power as central to organisational change. At first the business case was positioned as oppositional to equal opportunity or affirmative action organisational initiatives (Dickens, 1999) that acted as a mechanism to create distance from equity concerns which were based on a discourse of equality and social justice. At a philosophical level, I argue for a dual approach, conceptualising diversity as a bridge resting on both equity and economic arguments (Pringle, 2006). This mirrors Dickens’s triple-pronged approach to equality action (1999), which is delineated as business-led policies, legislative regulation and also a social/joint regulatory initiative that includes non-managerial employees and trade unions.

The practice of managing diversity and dealing with cultural differences between employees tends to emanate (in organisations large enough to have them) in human resource (HR) management departments or managers responsible for those organisational functions. Unfortunately HR departments are often driven by notions of ‘best practice’, determining appropriate actions for delineated situations. Aspiring to be best and to engage in excellent practice is laudable, but suggesting that diversity can be best managed through a predetermined and documented system will not provide creative and diverse practices. Rather, such an approach will result in a limited and limiting hegemonic discourse for managing workplace diversity. What is needed is a plethora of practice and diverse diversity management. As a result we require theory, or at least a conceptual frame, that is able to take account of local nuance and conditions while providing a process for analysing the tensions and benefits arising from work relations between diversity groups.

Being located in New Zealand at the ‘edge of the universe’ (Manhire, 1991 cited in Jones and Stablein, 2006: 146) has a direct impact on what are the salient diversity issues. The nature of the issues around inequity are different from those in other localities such as the UK, the US or even nearby Australia. Issues around inequality and equal opportunity (economic as much as political) are cast within a neo-colonial frame of bicultural relations between the indigenous people, Maori, and Pakeha, the descendents of colonisers who arrived relatively recently in historical times around 1850. It is the disjunction between the dominant diversity discourses and the results of local academic debate (Humphries and Grice, 1995; Jones and Stablein, 2006) plus more policy and practitioner-orientated discussions of diversity (Leung, 2006; EEO Trust, 2008) that has created the well-spring of discontent from which the theoretical direction discussions of this chapter arose.

In what follows I position ‘workplace diversity’ as spanning macro and micro levels of analyses. A position that is not either/or, an area that includes both social justice and economic rationales. I highlight two key delineators for this emerging field of workplace diversity: power and context. I then suggest an integrating theory invoking Pierre Bourdieu’s social theory of practice as a potential way forward to theorise and further research in workplace diversity.

## POWER AS PIVOTAL

Workplace diversity has at its core ‘membership in social and demographic groups and how differences in identities affect social relations

in organizations' (Nkomo and Cox, 1996: 339). More recent critical approaches to workplace diversity (Dickens, 1999; Linnehan and Konrad, 1999; Prasad et al., 2006) argue that power is an essential concept. As a consequence, research in workplace diversity will focus on historically disadvantaged groups that have systematically faced discrimination and oppression at work (Prasad et al., 2006).

This is a significant shift from the initial framing of diversity (Loden and Rosener, 1991) into primary (gender, race, ethnicity, age, sexual orientation, physical and psychological ability) and secondary (parental status, education, work background, income, marital status, military experience, religious beliefs, geographic location) dimensions. An early emphasis was also placed on the semantic meanings of diversity such as 'variety' (Milliken and Martins, 1996: 402). The conceptualisation of diversity without power led to a looseness and proliferation of 'variables' in organisational research including status effects, functional background, tenure or personality differences (Milliken and Martins, 1996) alongside power-infused concepts such as gender and ethnicity. This blurring of the salient dimensions of diversity diluted and directed attention away from group inequalities and differential opportunities for individuals because of their membership in groups that had been disadvantaged within a country or region over a long period. This conceptual confusion around what is significant about being different from the organisational 'norm'<sup>1</sup> was exacerbated by the reliance on the business case rationale.

The business case for workplace diversity originated in the US private sector as 'a management-focused, economic argument to promote corporate investment in workforce diversification'. It explicitly 'links investments in organisational diversity initiatives to improvements in productivity and profitability' (Litvin, 2006: 75). A downturn in business returns can lead to lowering the diversity priorities or even exclusion of diversity issues from the organisational agenda. In addition, an economic case can be argued against equity actions. Positioning power as central requires a dual decision-making rationale demanding complementarity between fairness and economic competitiveness, or a goal of 'social justice and economic efficiency' (Dickens, 2006: 306). 'Business case rationales are inevitably contingent, variable, selective and partial and often underplay the wider context within which they have to be pursued' (ibid. 299). It is to the exploration and analysis of context that the discussion now turns.

## CONTEXT AS CRUCIAL

Macro analyses are important to any interpretation of workplace relations. The dynamics of diversity in the workplace cuts across society,



organisational, group and individual levels, and demands a theory that, at least, encompasses multiple levels. Crucial to an understanding of how workplace diversity may play out is the country context. It is through analysis of the historical and socio-political influences that knowledge of the relative power positions of identity groups can be gained. Relationships between the dominant and disadvantaged groups vary over time as societal discourses shift (Prasad, 2001) with power relations between identity groups in organisations tending to mirror societal power relations (Linnehan and Konrad, 1999). Four influencing factors are suggested here as key to identifying the relative power positioning of social identity groups within a nation or region: historical and socio-political events, population demography, legislation, and labour market forces.

The contemporary socio-political context within a country is a combination of recent shifts in societal and political power intertwined with longer-term historical patterns. For example, the colonial legacy continues through acts of resistance by indigenous peoples, coupled with struggles by immigrant groups for greater political voice. Post-colonial tensions are apparent in such former colonising nations as Britain, the Netherlands and France, as they receive migrants from past colonies.

An impetus for studying the organisational effects of workplace diversity came from population and projected labour force demographics. Varying fertility rates among different ethnic groups and shifting immigration patterns have contributed to a dynamic workforce demographic. The nature of historically disadvantaged groups varies within countries and regions. With the exception of women, the societal political power of marginalised groups loosely relates to the representation and voice in population demography. For example, within the US population there are approximately 1 per cent Native Americans/Alaskans, 2 per cent indigenous Aboriginals in Australia, and in NZ indigenous Maori make up 15 per cent of the population.<sup>2</sup> A major argument for changes in organisational composition arises when the population proportions of specific groups are not reflected in the organisational demography.

The impact of demography is based on assumptions of fair representation, the foundation of democratic nations. Curiously there is an oppositional stance between the foundations of fairness, justice and equality and the dominant hierarchical organisational forms. Within these organisations, demographic representation and principles of majority rule do not apply; rather governance parallels feudal kingdoms, with power under the jurisdiction of a few. Within the socio-political labyrinth, the government or state has an important role. It has the capacity to act as a force to counter inequalities and reinforce the democratic tenet that all are equal before the

law. Thus society, organisational policies and to a lesser extent, organisational practices are all influenced by legislation.

The nature of the government and the legislative framework creates and reinforces the normative conditions between groups within society. Legislation both leads and reflects popular opinion and provides a guide for normative action. The development of affirmative action was first introduced in the US into public sector organisations by presidential executive orders and then through legislative levers to require private sector contractors to comply with equity directives before they could do business with the government bodies (Konrad and Linnehan, 1999). Many other Western countries followed this pattern of government initiation for implementing equal employment opportunities (Pringle et al., 2008). In contrast, workplace diversity discourses are situated strongly in the private business sector where actions for the 'public good' are de-emphasised or ignored.

There are limits to the degree that the enactment of legislation can change behaviour, attitudes and values (Jain et al., 2003), nevertheless it provides an indicator of societies' aspirations. The legislative landscape varies by nation state although most developed and developing countries have anti-discrimination legislation (*ibid.*). Common practice in comparative studies is to assess country-specific legislation against United Nations declarations (Mor Barak, 2005). Within each country the government has the potential to act as a regulatory force affecting conditions of employment, the broad nature of the labour market and acceptable industrial relations.

Contemporary labour market conditions are a strong force in recruitment decisions. If the economy is in recession or the level of unemployment is high then there is less pressure on organisations to hire members from historically disadvantaged groups that deviate from a dominant organisational demography. Conversely, if there are high levels of skill shortages in specific occupations, then the business imperative may take precedence over the desire for homogeneity in the workplace. However, other factors in the business environment come into play. For example, emerging research (Perotin et al., 2003) has identified that small and medium-sized enterprises (SMEs) are unlikely to rapidly take up equity initiatives, although they can be influenced by a strong regulatory environment.

Struggles for voice and greater power for some excluded groups, such as working classes, have taken place through collective action of the union movement. Trade unions also operate within the broader socio-political context, and consequently there is variability in union activities in the labour market and even the acceptance of the principle of collective bargaining as part of workplaces. For example, 98 per cent of the workforce in Austria are covered by collective negotiations compared to 15 per cent

in the US (Greene and Kirton, 2006). A macro focus on country context brings together employment relations, sociological and institutional theory to management concerns, all within an organisational setting.

## LEVERAGING LEVELS FOR ILLUMINATION

Arguing that power is a pivotal signifier in delineating the boundaries of workplace diversity narrows the focus while the inclusion of country contextual factors broadens the perspective. The inclusion of power spans analytic levels, but its study within organisations has been rooted in a micro level of interpersonal dynamics and inter-group theory (Elmes and Connelley, 1997). For more effective organisational analysis and change there is a need to take a more multilevel approach (Yammarino and Dansereau, 2004). Taken together, the inclusion of both macro and micro levels has the potential to increase the depth of analysis and understanding of workplace diversity.

A common frame used in organisational behaviour studies is the layering of macro, meso and micro levels (House et al., 1995). In this application the macro level would refer to the country context including demography and socio-political arrangements; meso would be at the level of organisation such as cultures and structures; while micro would be at the level of individual attributes, supervisor–employee dyads and small group interactions (Pringle et al., 2008). Such a tripartite system could be used to sketch the landscape of workplace diversity, but it is a static picture without concepts to explain inter-level interaction apart from what may arise from statistical analyses of specific empirical studies. How might these levels be linked in an integrated framework which deftly places power relations at the centre?

A promising approach comes through the social theorising of Bourdieu, which is increasingly receiving attention from organisational scholars (Iellatchitch et al., 2003; Özbilgin and Tatli, 2005) citing and speculating on possibilities for application. There are many fruitful avenues for the application of Bourdieu's theory, such as the analysis of habitus and field in different organisational sub-disciplines, for example, careers (Iellatchitch et al., 2003; Mayrhofer et al., 2004), entrepreneurship and SMEs (Gorton, 2000) and gendered employment relations (Sayce, 2005). Many aspects of Bourdieu's work have potential efficacy but it is his integrative and relational approach, connecting the more micro concept of 'habitus' (Bourdieu, 1977) through the individual's accumulated *capital* to the macro level of *field* that has rich possibilities for workplace diversity theorising.

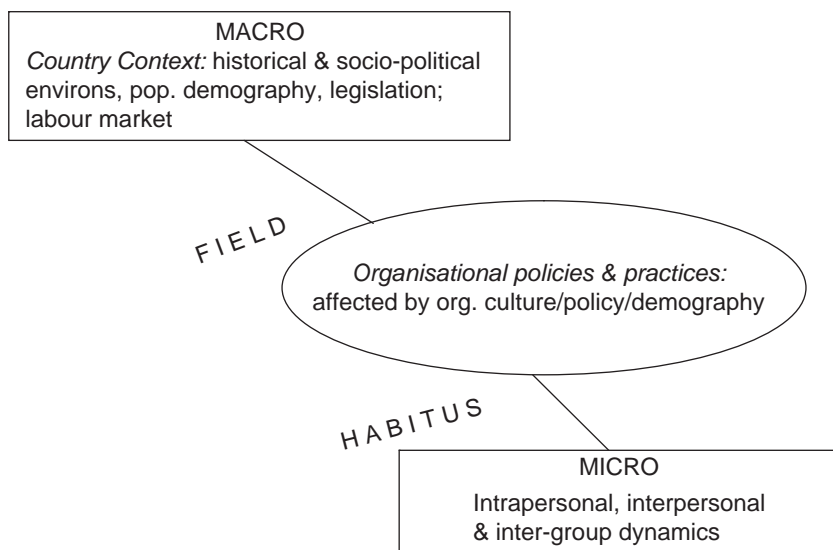


Figure 5.1 Research frame for workplace diversity

In Bourdieu's terms, 'field' is simultaneously a space of conflict and competition in which participants seek to establish monopoly over the kinds of power effective in it. Within Bourdieu's theory of practice, the autonomy of action or freedom of practice is limited for the individual by the rules of social field. In the case of workplace diversity, what is the 'field' can be construed in two ways which are not mutually exclusive. Özbilgin and Tatli (2005) located 'field' within organisations but given the impact of country context in shaping workplace diversity, 'field' might be usefully applied to the extra-organisational environment as indicated in Figure 5.1. At the macro level the rules are established by the legislative constraints and also the societal norms that have evolved within a specific historical and political context. Thus to understand how social identity groups are positioned and the power relationships between them requires an analysis and understanding of how historical and socio-political influences have moulded the contemporary landscape. The second layer of the social field in workplace diversity is the rules and norms provided by the organisation, itself positioned within specific occupational and industrial sectors. As noted in the figure, the organisational field is manifest as the policies and practices of the organisational members, especially the power holders: the managers and supervisors.

The other more micro-level construct of Bourdieu is that of 'habitus'. Habitus is acknowledged by scholars as a difficult and ambiguous concept

to delineate clearly (Lizardo, 2004). But in an attempt to overcome inaccuracies most writers quote Bourdieu directly:

*habitus*, systems of durable, transposable *dispositions*, structuring structures predisposed to function as structuring structures, that is as principles of the generation and structuring of practices and representation which can be objectively 'regulated' and 'regular' without in any way being the product of obedience to rules. (1977: 72; original italics)

Habitus is a dialectical concept that has the 'capacity to structure while at the same time to be structured' (Lizardo, 2004: 384) or in more individualistic psychological terminology, to perceive and categorise while being simultaneously perceived and categorised. This dynamic aspect of habitus is important in the analysis of workplace diversity for it is a '*generative dynamic structure* that adapts and accommodates itself' (Lizardo, 2004: 376; original italics). Thus a diversity habitus is both the result of the field and yet can impact on the field, through influencing the power relations in that field. This interaction between the habitus and the field includes the processes of assimilation and accommodation that are well known within discussions of workplace diversity. Thus the interaction of field and habitus is not one-way, for the individual can modify the rules of the field, and to some extent what is valued.

The key link between field and habitus and the means for domination and power exchange is through the concepts of *capitals* (Bourdieu, 1986). Each individual within a specific field has a unique portfolio of capital (Iellatchitch et al., 2003). Capital acts as 'a social relation within a system of exchange' (Harker et al., 1990: 13). It is extended to all goods; material and symbolic and capital does not exist except in relation to a field (Bourdieu and Wacquant, 1992). Bourdieu's analysis emphasises class differences through French culture, both inherited and acquired and he posits three major kinds of capital: *social*, *cultural* and *economic* which combine into a perceived fourth *symbolic* capital. It is '[t]he rules of a particular social field specify which combination of the basic forms of capital will be authorised as symbolic capital, thus becoming socially recognised as legitimate' (Mayrhofer et al., 2004: 874). What is valued as symbolic capital is determined by the macro factors in the field; in this case of workplace diversity: historical and socio-political events, population demography, legislation, and labour market forces outlined earlier.

Inevitably there will be conflict over the specific capitals that are valued in the organisational field (Özbilgin and Tatli, 2005), with the possession of valued capital as the basis for domination. Another important aspect in the organisational dynamics within workplace diversity is how individuals demonstrate and make visible the capital that they have. One's capital is

the result of inherited characteristics, the social position of one's family and the place in the culture of the social identity group to which an individual belongs. For a member of a workplace diversity identity group this will be partly determined by the demographic mix, relevant legislation influencing the norms of the society and within organisations, as well as the specific country history and politics. All of these factors are affected by the contemporary labour conditions.

## AN APPLICATION

Applying Bourdieu's theory to an analysis of women in the NZ workplace would include the following elements. The analysis of the macro *field* would place women as having substantive social and cultural capital. In historical terms, women have created a place in public society from the early fight for the right to vote in 1893 for women of all ethnicities. Women have forged a place in society by an assertive femininity that values independence and active decision making as well as the more stereotypical cult of domesticity and roles as moral and emotional guardians (Pringle, 2004). Within Maori culture there is also evidence of strong female leadership, from pre-colonial times to the present day (Else, 1993). These historical societal factors combined with an active feminist movement encouraging and affirming that 'girls can do anything' laying the groundwork for a strong habitus. Yet in terms of economic capital, women as a group fare less well, with the pay gap intransigent at 87 per cent of the average male hourly rate. Even at the same managerial level, women report a lower salary package than men with the gap increasing from junior (92 per cent) to middle (86 per cent) to senior (88 per cent) management (McGregor, 2002).

In demographic terms women have constituted just over 50 per cent of the population for more than 100 years. There has been a rapid increase in workplace participation over the last decades of the 20th century; from 25 per cent in the 1950s to 44 per cent in 1996 which has now plateaued around 47 per cent in 2008. Within contemporary society women have played prominent roles in public life with a female prime minister for the past nine years; women constitute approximately a third of Parliament (McGregor, 2008) as well as occupying prominent roles such as chief justice and until recently attorney-general and governor-general. Human rights legislation supports equality for women but compared with Scandinavian countries there has been modest government support in terms of 14 weeks paid parental leave. Within the organisational field the strength of women's capital is weaker with an enduring masculinity providing powerful symbolic capital especially at higher organisational levels

(Olsson and Pringle, 2004) which is signified by low female representation in corporate senior management (8–9 per cent) but good representation at 34 per cent of directors of Crown (government) companies (McGregor, 2008). Women succeed by making visible an acceptable masculine gender. In summary, there is positive capital power for women in the societal field as it is encountered within the organisational field.

In terms of the process within and between fields, each individual variously complies with and resists organisational directives and norms. At a broader level, relationships between the disadvantaged groups and the dominant groups are not fixed but change with shifts in societal discourses over time. The social shifts around equity in the workplace in Western countries such as the United States and New Zealand, can be observed in the waning of the gender discourse and the ascendance of ethnicity discourses. This illustration of applying Bourdieu's theory to a women's identity group in the local context is necessarily sketchy within the bounds of this chapter but hopefully will provide an indication of how a multilevel analysis on a specific diversity identity group could be carried out in future research.

In conclusion, this chapter has argued that for workplace diversity to move beyond a myopic inquiry into organisational processes it is critical to include a contextual analysis with power located at the centre. An important advantage of considering Bourdieu's social theory to develop an inclusive theory of workplace diversity is that macro and micro forces can be explored in a single framework, one that includes dynamic shifts in the power relations between individuals and the structures within which we work. Both micro and macro aspects are important for understanding workplace diversity. Bourdieu's theoretical concepts hold promise for exciting future theoretical and analytical developments.

## NOTES

1. 'Norm' is noted as being a shortened male name in English, a signifier of masculine dominance in most business organisations.
2. US: [factfinder.census.gov/servlet/](http://factfinder.census.gov/servlet/);  
Australia: [www.une.edu.au/campus/chaplaincy/uniting/links/diversity](http://www.une.edu.au/campus/chaplaincy/uniting/links/diversity);  
New Zealand: [www.stats.govt.nz/census/2006-census-data/national-highlights/pdf](http://www.stats.govt.nz/census/2006-census-data/national-highlights/pdf).

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## 6. Reflections on researching inequalities and intersectionality

**Geraldine Healy**

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### INTRODUCTION

In this chapter I reflect on approaches I have used (alone or with others) in researching inequalities and on the entrenched resilience of inequality practices and processes in organisations at the beginning of the 21st century. It is clear that the resilience of inequality practices is a global challenge. From a gender perspective, ‘there is not a single country in the world today where women have the same opportunities as men, and although progress has been made in some areas in recent years, women are still disadvantaged in economic and political life’ (Socialwatch, 2006). Yet gender is only one part of the inequalities picture; race, ethnicity, class, sexuality, disability and age are all important in understanding the nature of inequalities.

Thinking on inequalities has increasingly focused on the importance of grounding research work in an intersectional approach to enable a deep understanding of mechanisms that underpin the resilient nature of inequalities. It is on this I seek to focus my discussion, drawing on recent empirical work – in particular, that on the intersection of sex and ethnicity. Much of this work has been done with a range of colleagues so I tend to use the first person plural in referring to research work.<sup>1</sup> For a definition of inequality in organisations, I turn to Acker, who conceptualises inequality as

the systematic disparities between participants in power and control over goals, resources and outcomes, workplace decisions, such as how to organise work, opportunities for promotion and interesting work, security in employment and benefits, pay and other monetary rewards, respect and pleasures in work and work relations. (2006a: 443)

Inequalities in organisations needs to understood in the wider economic, social and political context.

## IMPORTANCE OF CONTEXT

Understanding context helps us understand the persistence and entrenchment of inequalities. The resilience of inequalities is found in the UK, Europe, the USA and other developed and developing countries, but its form varies. Nevertheless, gender, ethnicity, religion, sexuality, disability and age will be critical factors in explaining the nature of inequalities in different countries and in their organisations.

I begin with the UK context which is at a critical juncture in the history of its equality project. Arguably, there has been an embracing of intersectional approaches in the policy and institutional structures of the UK resulting from recent governance changes with respect to the regulation of equalities. The bringing together of the main enforcement bodies and the setting up of the Equality and Human Rights Commission (EHRC) has led to a time of reflection. The EHRC brings together the former equality commissions (on sex, race and disability and human rights) and includes three further equality strands in its remit: religion, sexual orientation and age.

The main enforcement bodies which made up the new EHRC were anxious to establish their legacies and shape the future agenda of the wider-reaching EHRC. The Equal Opportunities Commission (EOC) and the Commission for Racial Equality (CRE) both accepted that while much had been done towards gender and race/ethnicity equality since their establishment in the 1970s, there was much to do. This was reflected in the title of the CRE's 'legacy' document 'A lot done, a lot to do' (CRE, 2007). The experience of Britain's black and minority ethnic population was summed up by the CRE as follows:

An ethnic minority British baby born today is sadly still more likely to go on to receive poor quality education, be paid less, live in substandard housing, be in poor health and be discriminated against in other ways than his or her white contemporaries. This persistent, longstanding inequality is quite simply unfair and unacceptable. (Ibid.: 1)

The CRE further argued that Britain, despite its status as the fifth-largest economy in the world, is still a place of inequality, exclusion and isolation. Such exclusion and inequality may act in different ways on different people. The EOC posed its concerns about women's lack of progress in its legacy document: 'The Gender Agenda: the unfinished revolution' (EOC, 2007). In particular, it highlighted the following economic gulfs between women and men:

- The ‘pensions gap’ will take 45 years to equalise: retired women’s income is currently 40 per cent less than men’s.
- The ‘part-time pay gap’ will take 25 years to close and the ‘full-time pay gap’ 20 years. Women working part-time earn 38 per cent less per hour than men working full-time. Full-time female employees earn 17 per cent less per hour than men.
- The ‘flexible working gap’ is unlikely ever to change unless further action is taken. Even though half of working men say they would like to work more flexibly, currently women are much more likely than men (63 per cent more likely) to work flexibly.
- At home, the ‘chores gap’ – the difference in the amount of time women and men spend doing housework per day – will likewise also never close, with women still spending 78 per cent more time than men doing housework.
- The ‘power gap’ for women in Parliament will take almost 200 years to close and it will take up to 65 years to have a more equitable balance of women at the top of FTSE 100 companies.

Moreover, these gaps may well be optimistic in their projection. In the very different contexts in which inequalities on the grounds of race and sex are played out, it is evident that the public policy initiatives, despite partial achievements, have not been able to address the persistence of deep inequalities.

In the above ‘gaps’, women are treated as a homogeneous group yet, as we know, women are separated by class and ethnicity, a common sex may not create a common bond. Indeed if we adopt an intersectional analysis, we may see these gaps as wider for some groups than for others. Our recent work has built on these gaps by introducing the concept of a ‘gendered ethnic employment gap’, a concept that provides focus to the difficulties experienced by black and minority ethnic (BME) women (Bradley and Healy, 2008):

- The *employment difficulties gap*. Over half of Pakistani women (56 per cent) and black Caribbean women (54 per cent) aged 16–34 said they often found it difficult getting a job. Almost half of Bangladeshi women (49 per cent) said they often or sometimes struggled to find work. Only just over a third (34 per cent) of white British women said that finding work was sometimes a problem (TUC, 2006).
- The *skill achievement gap* is very important given the high investment of BME women in education and training. Of the same young women who struggled to find employment opportunities, while just over one in twenty of the white British women (6 per cent) said they

had ended up taking a job below their skill levels, almost a quarter (22 per cent) of Pakistani women had accepted jobs for which they were overqualified (ibid.).

- The *presumptions gap* is evident in the differential way that women are treated as a result of their ethnicity. Employer attitudes and presumptions about ethnic minority women are also causing problems when prospective job candidates are called for interview. Whilst only 14 per cent of white British women had been asked about plans to get married or have children, the figure rises to a fifth (21 per cent) of Bangladeshi women, and around a quarter for black Caribbean (24 per cent) and Pakistani women (26 per cent) (Bradley and Healy 2008).

These gendered ethnic employment gaps were very evident in the research projects we have undertaken. For example, black women complained that they were not considered as management potential, that white managers did not take black women's complaints seriously and that they became invisible to white colleagues; that black and minority ethnic women were overlooked for promotion on racist or sexist grounds (ibid.) and that they were discriminated against on the grounds of their religion and culture particularly with respect to clothing (Bradley et al., 2007b). Equally, the research identified the optimism of many young black and minority ethnic workers, a drive to succeed and in some a belief that the laws would protect them from the gendered ethnicised employment gaps that they face (Bradley et al., 2007b; Healy et al., 2006a). Further, our research has identified the importance of collectivism in shaping action and combating dominant power relations to challenge resilient gendered employment gaps (Healy et al., 2004). Equally, it has exposed that collective organisations too have their gendered employment gaps and that they tend to become gendered oligarchies (Healy and Kirton, 2000).

In the USA, gendered ethnicised employment gaps are also evident. There is no state where the typical full-time worker earns as much as the typical man. At the present rate of progress it will take 50 years for women to achieve earnings parity with men nationwide (Hartmann et al., 2006). Hartmann et al. also point out the intersectional differences. White women earn 73.1 per cent of what white men do and Asian American women earn 80.8 per cent of what white men earn, African American women earn only 63.2 per cent, Hispanic women only 52.4 per cent and Native American women only 59.8 per cent of what white men earn (ibid.: 4). Nevertheless, the wage gap has continued to close, but the reason relates to the fall in men's real wages which have fallen slightly more than women's (Hartmann et al., 2006). In European countries we have shown how vertical gender segregation varies and with respect to academia we challenge conventional wisdom; rather

than Scandinavian countries having the least vertical segregation, this prize falls to Turkey (Healy et al., 2005). This of course underlines the importance of structural factors in understanding the nature of inequalities.

## INTERSECTIONAL APPROACHES TO RESEARCHING INEQUALITIES

The emphasis in much of my work, with colleagues or alone, has been influenced (often implicitly) by a critical realist methodological thinking which has the potential to provide the tools to understand the complexity of gender relations (Healy et al., 2006b: 291). It offers the means to understand better the intersection between gender, ethnicity and class, and needs to be understood without losing sight of the complex interrelationship between agency and structure as expounded by critical realist and structuration theorists (see Giddens, 1979; Layder, 1993; Archer, 1995). A critical realist approach offers a layered or 'stratified' model of society which draws out the interrelationship between macro (structural, institutional) phenomena as well as the more micro phenomena of interaction and behaviour and the importance of history at different levels (Layder, 1993: 7). Thus, in bringing together macro–micro levels of analysis, Layder urges the researcher to take account of the interrelationship between context, setting, situated activity and the self and at the same time to sensitise them to the importance of history at each of these levels.

Macro, meso and micro levels of analysis are important in explaining intersectional gendered ethnicised employment gaps. The different histories of migration, colonialism and slavery and how these legacies impact differently on different groups today still shape part of our contemporary understanding. By bringing in an intersectional approach we see a richer and more complex picture than by dealing simply with ethnicity or with sex (Ahmad et al., 2003; Holgate et al., 2006) and further it offers greater emancipatory understanding (Young, 1990; hooks, 2000).

We owe much of contemporary thinking on intersectionality to black feminists (Young, 1990; hooks, 2000, 2004; Collins, 2004). Collins (2004) states that while different socio-historical periods may have increased the saliency of one or another type of oppression, the thesis of the linked nature of oppression has long pervaded black feminist thought. She goes on to say that minimising one form of oppression may still leave black women oppressed in other equally dehumanising ways (p. 109).

The term 'intersectionality' has philosophical and policy dimensions, but crucially it tends to address oppression and subordination (Young, 1990; United Nations, 2001). For the United Nations, the term intersectionality

- attempts to capture the consequences of the interaction between two or more forms of subordination;
- addresses the manner in which racism, patriarchy, class oppression and other discriminatory systems create inequalities that structure the relative positions of women, races, ethnicities, class and the like . . . ;
- racially subordinated women are often positioned in the space where racism or xenophobia, class and gender meet. (UN, 2001)

The above definition addresses the consequences and manner of intersectionality, whereas also crucial in examining inequalities are the mechanisms that lead to those consequences. With Harriet Bradley I argue that we should caution against ownership of the intersectional concept by post-structuralist thinking (Bradley and Healy, 2008). Rather we argue that a richer analysis takes account of the interrelationship of agency and structure, giving insight into the mechanisms that lead to the reproduction of inequalities, as well as the less frequent changes in their patterning.

I also think it wise to remind ourselves of why we are concerned with inequalities. Fundamental to my concerns with inequalities is the belief in the rights of human beings for social justice in all aspects of their lives. Yet our understanding of what a lack of social justice means is partial, especially for those from dominant groups. Young shows that general forms of oppression (which she calls ‘cultural imperialism and violence’) consists in a group’s being invisible at the same time that it is marked out and stereotyped (1990: 123). She develops a powerful argument that I quote below:

Culturally imperialist groups project their own values, experience, and perspective as normative and universal. Victims of cultural imperialism are thereby rendered invisible as subjects, as persons with their own perspective and group specific experience and interests. At the same time they are marked out, frozen into a being marked as Other, deviant in relation to the dominant norm. The dominant groups need not notice their own group being at all; they occupy an unmarked, neutral, apparently universal position. But victims of cultural imperialism cannot forget their group identity because the behaviour and reactions of others call them back to it. (Ibid.: 123)

I quote this section at length because I think it captures the chasms between the ways that groups experience the world. In our work researching gender and ethnicity in organisations (cited earlier), women and men repeatedly shared their experiences of being invisible, of being other, and feeling ‘less’.



Patricia Hill Collins argues that black feminist attention to the interlocking nature of oppression is significant because it shifts the entire locus of the investigation from one aimed at explicating elements of race or gender or class oppression to one whose goal is to determine what the links are among these systems. Thus the interaction among multiple systems is the object of the study (Collins, 2004). In the US context, Collins recognises that African American women may have a vested interest in recognising the connections among dualities that together comprise the construct of dichotomous oppositional difference. She comments that it is surprising that more women have not also come to this recognition. Such oppositional differences relate to terms that only gain their significance in relation to their difference from their oppositional counterparts, for example, black/white, male/female. For Collins, these dichotomous oppositional differences invariably imply relationships of superiority and inferiority, hierarchical relationships that mesh with political economies of domination and subordination (p. 110). Thus, black women, for example, will face an array of either/or dualities. The consequence of the political economies of domination and subordination are evident in the earlier section on gendered and ethnicised employment gaps. The dualities shape the experience of work of black and minority ethnic women in our various studies. These are not uncomplicated dualities; for example, unsurprisingly we found evidence where hierarchical relationships mesh with systems of racism leading successful black women to share common understandings of the occurrence of racism with black women at lower levels of the hierarchy in an organisation rather than with their white peers (Bradley and Healy, 2008). Understanding how these dualities play out in organisations leads us to inequality regimes.

## INEQUALITY REGIMES

I argue here that a way forward to researching intersectionality may be found in Joan Acker's (2006a) work and the concept of inequality regimes, which Acker argues are embedded in all organisations. Intersectionality is a central aspect of inequality regimes, which Acker defines as 'interrelated practices, processes, actions and meanings that result in and maintain class, gender and racial inequalities' (p. 443). Thus we can argue that the gendered employment gaps discussed earlier are characteristics of inequality regimes.

Nevertheless, investigating inequality regimes in organisations poses particular challenges because of their institutionalisation and embedded nature. Inequality regimes are therefore complex and multifaceted, but of

central importance to an understanding of the reproduction of inequalities. Acker argues that the gendering and racialising class practices happen in the main in organisations (Acker, 2006b: 105). She isolates six interconnected components of inequality regimes: the bases of inequality; the shape and degree of inequality; organising processes that produce inequality; the visibility of inequalities; the legitimacy of inequalities; and control and compliance. I see these components interacting and operating at different levels, with the first two in particular operating at the macro-social as well as the institutional level of the organisation. Although Acker avoids levels in her analysis of inequality regimes (Acker, 2007), instead seeing the components constantly in the process of construction, I think that these views are not necessarily mutually exclusive. In our work on analysing inequalities faced by Caribbean, Pakistani and Bangladeshi women in the public sector, this approach was of value in focusing on the multifaceted nature of inequalities (Bradley et al., 2007a). Investigating inequality regimes in organisations draws attention to their expanding boundaries which Acker (2006b) argues are becoming extended and segmented with relatively new forms of organising production and distribution and that managements use existing gender, class and race inequalities to maximise control and minimise costs in production and distribution. The value of this approach lies also in its attention to the impact of organisational decisions on, for example, wages in developed and less developed countries which in turn impact on their respective inequality regimes. Elsewhere we have talked of experiences of inequality as ‘shifting sands’; the circumstances constantly change yet the outcome of subordination often remains resilient (Healy and Oikelome, 2006).

The resilience of intersectional oppression recurs time and again in our research work in organisations. Sometimes it is not recognised as oppression, but discussed as disadvantage particularly by those who do not fall into the oppressed class. We may see forms of discrimination built into the career structures where disadvantage is formally constructed at the point of recruitment, reward and promotion. Our work with Franklin Oikelome showed that such inequalities occur even with highly qualified professional workers such as doctors; and further that explanatory mechanisms lie in formalised, rationalised and gendered structures such as country of qualification and nature of the work contract (Oikelome and Healy, 2007). Equally, social interactions lead to informal but constant constructions of discriminatory social processes in the everyday interactions in organisations. No matter where we have carried out empirical work, sadly these pictures of inequalities are replicated in different workplaces. Whether we are examining the health services (*ibid.*), retail, post and telecommunications, further and higher education, local government (Healy et al., 2004)

or trade unions (Kirton and Healy, 1999; Healy and Kirton, 2000), the bases of inequality and shape and degree of inequality are constantly in a process of construction. Moreover, the components of inequality regimes are important analytical tools in identifying the causal mechanisms operating in particular organisational inequality regimes.

## POLICY IMPLICATIONS

Intersectionality has now become embedded in contemporary policy debates in equality and diversity in the European Union (EU). These debates tend to centre on the nature of legal protection and redress. Further it tends to be couched in the language of individualism. The concern (laudable, albeit) is to allow the individual to seek redress whereas the argument in this chapter is that discrimination is a collective experience that impacts on groups. This raises the question as to whether the more we engage with intersectionality, the more likely we are to depoliticise the term by reducing it to an individual disadvantage rather than a collective oppression.

The United Nations (2001, in Bradley and Healy, 2008: 98) recommends an 'intersectionality proofing' framework, which might have several distinct components:

1. Data collection and audit, including attention to culture.
2. Contextual analysis: using the data to diagnose what particular problems exist, with a strong focus on how multiple disadvantages may be displayed (for example, are Asian women in lower positions than Asian men?).
3. Review existing policies, initiatives and systems of implementation and alter them if they are not being effective.
4. Determine priorities, in consultation with the relevant groups of employees (different groups of women may experience different types of problems, so each group should be allowed to voice their concerns).
5. Identify leaders and champions to take implementation forward and raise its profile in the organisation.
6. Implementation of intersectional policy and initiatives with action to embed it throughout the organisation.
7. Monitor the outcomes and publicise achievements.

This approach reflects conventional advice on the organisation, management and monitoring of inequality on race and sex, although the inter-

sectional emphasis may not be so common. Statistics on the sex and race approach to monitoring means that statistics often do not differentiate black men from white men, black men from black women or black women from white women. This chapter has mainly dealt with race, ethnicity and sex. But of course, there are other intersectional oppressions that are less visible and on which there is less evidence, for example, oppression related to disability, age, sexuality or religion. Nevertheless, an intersectional framework would draw attention to these gaps and direct attention to a deeper exploration of the differential impact of the shape and degree of inequality in an organisation. Such a framework with all its inherent difficulties may remain a distant dream if the history of the equality project is any indication of its future. Despite some 40 years of equality legislation in the UK, there was only partial progress identified in the recent Workplace Employment Relations Survey (WERS) 2004 survey. In Walsh's (2007: 37) analysis of the WERS dataset, she found a very poor picture of equality monitoring:

- Only a minority of workplaces – less than one in four – sought to monitor or review their procedures to identify indirect discrimination with respect to gender, ethnicity, disability or age.
- One-fifth and one-quarter of all workplaces monitored and reviewed procedures relating to recruitment and selection and only 1 in 10 workplaces did so with respect to promotions,
- Few reviewed relative pay rates (5 per cent for ethnicity and 7 per cent for gender).
- There was a much greater likelihood of managerial monitoring in larger workplaces, as well as workplaces that were part of a larger organisation and unionised workplaces
- Public sector workplaces were more inclined to engage in equal opportunities (EO) measurement than those in the private sector (27 per cent compared with 14 per cent).

Nevertheless, those who investigate inequality regimes in organisations continue to recommend that monitoring forms part of change. A recent EU study again drew attention to the need to challenge multiple discriminations (Zarrehparvar, 2007). Its conclusions included intersectional monitoring. In our own various research projects, recommendations on monitoring have been important. How else do we know the extent of a problem? Yet we have to accept that progress on monitoring is painfully slow. The lack or only partial evidence of progress does not lead us to an optimistic assessment of progress in challenging multiple or intersectional discrimination.

## CONCLUSIONS

Does this discussion help us explain the ‘gaps’ introduced at the beginning of the chapter? I have argued that inequalities cannot be adequately analysed and theorised without understanding both the immediate situated activity of work and ‘its wider enmeshment in a system of gender [or race or class] segregation’ (Layder, 1993: 97). Thus an examination of work experiences demonstrates how the work setting is firmly connected to increasingly remote relations of domination and subordination in the wider social fabric (Healy et al., 2006b). Analysis of inequality regimes focus attention on the detail of inequalities in organisations where discrimination is played out in both organisational structures and in the relational interactions. I do not argue for a deterministic approach, nor do I wish to enter the realms of relativism. But my research, alone or with colleagues, has shown the different ways actors can act upon structures to not only reproduce discriminatory patterns but also to transform them. Thus understanding the mechanisms as well as the nature and consequences of inequality must remain important in researching inequalities.

Policy initiatives to date have been disappointing. Those who have been most at risk of subordination have had difficulty in challenging inequality regimes. This is not to say that some have not had great success often through their collective organisations and coalitions. But on balance, the overall picture, particularly when class, gender and ethnicity intersect, has been that of a resilience of inequality processes and practices. Why is this? Equality experts often point to systemic failure. In other words, if they can get the policy right, they will achieve the desired outcomes of fairness. The underlying assumption to this argument is that all those involved are committed to the equality project and will comply with policy requirements. Yet as has been evident from this chapter, this is clearly not the case. What has been implicit in my and others’ research is the importance of power relations and their associated interactions in shaping inequality regimes. For some, there may be incentives to contribute little or worse, to foil the equality project. Will the intersectional policy shifts make a difference in the UK? There are many who fear that the intersectional approach may dilute the emphasis on groups and result in a highly individualised approach. These fears are very real, and some grounding in the oppression of groups needs to be sustained in debates on intersectionality. Then, intersectional research may reveal new insights to the enmeshed nature of power relations in organisations and while difficult and complex it has the potential to contribute to the equality project nationally and comparatively, not just to chart its failures.

## NOTE

1. This chapter draws on work I have undertaken with Harriet Bradley, Cynthia Forson, Gill Kirton, Franklin Oikelome and Mustafa Öszbilgin to whom I am grateful.

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## 7. Contextualising diversity management

**Jawad Syed**

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### INTRODUCTION

The discourse of managing diversity originated in the USA and has generally been adopted across Western countries such as the UK, Canada and Australia (Agocs and Burr, 1996; Jain and Verma, 1996; Teicher and Spearitt, 1996; Liff, 1997; Syed, 2008). The discourse is predominantly shaped by the demographic, socio-cultural and economic realities in the USA and other Western contexts. Accordingly, there are concerns that a US-centric approach may not hold well for diversity management in other national contexts (Jones et al., 2000; Syed, 2008).

Transplanting human resource practices from one cultural context to the other has been proved counterproductive by the experiences of many multinational firms (Ouchi, 1981) but it does not suggest that one society cannot learn from another. The transfer of learning across borders, however, calls for ‘prudence and judgment’ (Hofstede, 2001: 375). Each culture has its own unique set of realities. The discourse and assumptions underlying a US-based approach obscure important local diversity issues. Some scholars such as Jones et al. (2000) suggest that ‘a multi-voiced discourse of diversity’ that challenges the universalistic notion of diversity at both the national and organisational level is required. Hofstede (2001) has discussed at length the pitfalls of following a management discourse that fails to account for local realities. He remarks that ideas and theories ‘about management and organisation are often exported to other countries without regard for the values context in which these ideas were developed’ (p. 374). Expanding on this topic further, Hofstede cautions against ‘fad-conscious publishers’ and ‘gullible readers’ who encourage the import of theories alien to one’s own land.

There are also concerns about the theoretical rationale as well as the utility of the extant diversity discourse (for example, Steyaert and Janssens, 2003; Syed and Kramar, 2007). For example, based on their study of migration and multicultural policies in the UK, Cheong et al.



(2007) highlight the need for a critical framework for assessing the links between diversity, social cohesion and social capital. Their study demonstrates how the discourse of diversity is socially constructed and value based, depending on the prevailing ideological climate. Considerations of social capital as a public policy tool to achieve social cohesion need to incorporate an appreciation of alternative conceptions rooted in a textured understanding of diversity processes and contexts.

This chapter attempts to offer a framework for contextualising the diversity management discourse. It argues that instead of a universal and uncritical definition and implementation of diversity management, there is a need to take into account the local context in understanding and managing diversity. For this purpose, the chapter deploys Syed and Özbilgin's (2007; in press) relational perspective of managing diversity and Tsui's (2004) perspective of high-quality indigenous (context-specific) research.

## A FRAMEWORK FOR CONTEXTUALISING DIVERSITY MANAGEMENT

Diversity management has been defined as the process of management built on a set of values that recognise that the differences between people are a potential strength for the organisation (De Cieri and Kramar, 2005). While there have been many studies on the implications of national culture on management practice (Doktor, 1982; Laurent, 1986; Hofstede, 1991), there have been few studies on diversity in contexts other than North America, Western Europe and Australia. For example, a small number of studies in other contexts include works by Jain and Verma (1996), Lawler (1996), Brown (1999), Fleury (1999), Jones et al. (2000) and Tshikwatamba (2003). All of these generally underscore the importance of taking local context into account in designing a diversity management programme.

The contextualisation of management research as an important approach contributing to global management knowledge is now increasingly recognised (for example, Hofstede, 1993; Rosenzweig, 1994; Rousseau and Fried, 2001; Whetten 2002; Tsui, 2004). Rousseau and Fried (2001: 1) offer two reasons that highlight the importance of a context-specific approach: the internationalisation of organisational research is giving rise to challenges in transporting social science models from one society to another; and, the rapid changes in work and work settings are likely to reshape the underlying causal dynamic of worker–organisation relations. Indeed, demographic composition, economic contexts and socio-political policies towards population diversity vary significantly across societies. Accordingly, legal and organisational response towards

diversity management in a country will be governed by its own unique social and work dynamics.

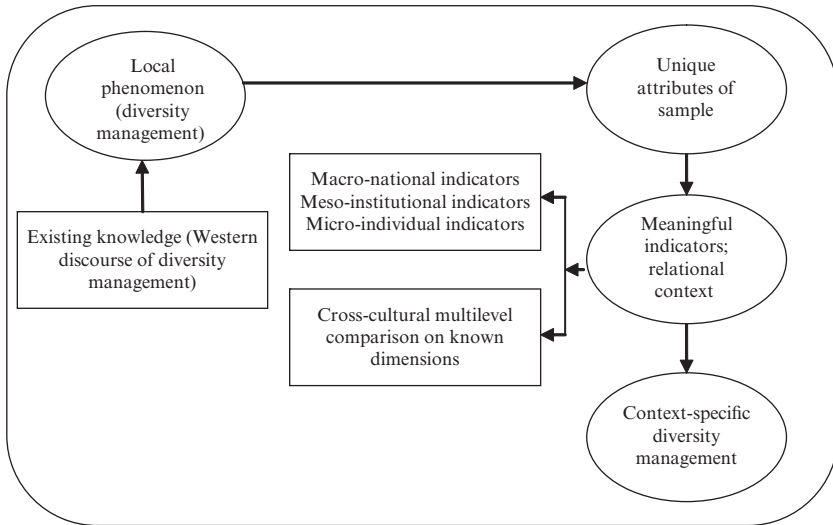
The practice of uncritical transportation of social and management science models from one context to the other has also been contested by Tsui (2004) who instead emphasises the need for indigenous research. (The term 'indigenous', however, is problematic because of its conventional use for native or aboriginal communities in Australia, North America and other countries. In this chapter, I use the term 'context specific' to refer to locally compatible strategies for diversity management.) Tsui (p. 503) suggests four guiding principles to conduct high-quality context-specific research. First, the research must be guided by the local phenomenon rather than an a priori framework, and the existing (generally predominantly US-based) knowledge must be treated at best as preliminary. Second, the research should focus on the unique attributes of the sample and how these attributes may influence the phenomenon being studied. Third, the researcher must ensure that the indicators are meaningful in the local context and belong to the domain of the locally developed constructs. Finally, the context-specific research must avoid cross-cultural examination involving two contexts that may differ on unknown dimensions.

A similar context-sensitive framework has been offered by Syed and Özbilgin (2007; in press) who propose a relational, multilevel framework to understand and tackle diversity management. They argue that effective diversity management is most likely to be realised specifically in contexts in which there is a broad structural and institutional support for diversity. Their proposed relational framework for managing diversity treats agency and structure of equal opportunity at macro-national, meso-institutional and micro-individual levels. According to this perspective, diversity management will remain inadequate unless tackled at all three levels while taking into account the contextual and individual factors. Figure 7.1 offers a framework for contextualising diversity management.

In the next subsection, we shall illustrate how the proposed framework (Figure 7.1) can be used to devise a context-specific perspective of diversity management consistent with the local multilevel contexts of diversity and its unique attributes.

### **Local Phenomenon**

The first stage in contextualising diversity management is to develop an understanding of diversity and its management as a local phenomenon. Although the international or foreign discourses of diversity and equal opportunity are not without value, yet, an uncritical approach towards universalising such discourses may be counterproductive because of



*Figure 7.1 A framework for contextualising diversity management*

cultural and contextual inconsistencies. Instead, the discourse must be grounded in the demographic composition of the local population, including the workforce participation issues and challenges faced by women, ethnic minorities and other historically disadvantaged groups. Also, issues related to immigrant workers and expatriates working in international companies are worthy of attention.

According to a relational perspective, the local phenomenon of managing diversity cannot be separated from its socio-cultural and institutional context (Syed and Özbilgin, 2007; in press). Previous research suggests that being alert to occupational as well as socio-cultural differences can improve our understanding of structural circumstances that frame the conditions and experience of work (for example, Johns, 2001: 39). The social science models of work, organisation and individual as well as gender relations that have been conventionally grounded in Western contexts are difficult to transport to other contexts. Due to cross-national differences, for example, the strength of religious traditions in many countries in the Middle East (Syed et al., 2005) as well as different legal and employment structures, differences in the factors underlying particular organisational practices and structures deserve unique attention (Rousseau and Fried, 2001: 2).

Gender diversity management in Muslim majority countries is one such example of a local phenomenon. With the exception of a few studies (such as Moghadam, 1991; Özbilgin, 2002; Mostafa, 2003; Sidani, 2005;

Syed et al., 2005), women's employment in Muslim majority countries remains underexplored. However, since the local phenomenon is different, for example in terms of the religion-based gender segregation and also economic circumstances, it may not be advisable to transport a US-based model of gender diversity management to Muslim majority countries.<sup>1</sup> This, however, does not mean that cross-border learning should not occur, particularly given the fact that a large amount of research is available on gender diversity management in the USA and other industrialised countries, yet, it is important to take into account the unique attributes of the sample within the local context.

### **Unique Attributes of Sample**

The second stage of contextualising diversity management pertains to the identification of key differences as well as similarities of the local sample from the traditional workplace and societal settings in which the diversity discourse originated. In particular, unique attributes of the local sample must be taken into account which might necessitate a 'non-traditional' response towards diversity management. Such attributes could be related to demographic composition, socio-political policy, economic structure and other contextual factors.

Once again, referring to the example of gender diversity management in Muslim majority countries, some unique attributes of the sample can be readily identified. In addition to the apparent religious differences between the West and Muslim majority countries (in terms of the predominant faith adhered to by the majority of the population), there are at least four unique attributes of the contemporary Muslim nations that warrant a context-specific approach.

First, in mainstream sociology, countries with a predominantly Muslim population are generally classified as outliers on gender relations and related demographic factors (Haghighat, 2005: 84).<sup>2</sup> Muslim countries have lower-than-average levels of female labour force participation and higher-than-average levels of fertility and mortality relative to non-Muslim countries at the same level of economic development (Weeks, 1988). According to the World Bank statistics, female employment in Muslim countries is 21.7 per cent compared to 38.1 per cent average for other developing countries (World Bank, 1999). Women in Muslim countries of the Middle East and South Asia are particularly disadvantaged in terms of literacy (Weeks, 1988: 27) and labour force participation (Youssef, 1978; Sivard, 1985; Moghadam, 1991). Indeed, this is a situation substantially different from what is witnessed in the West.

Second, in contrast to the economically developed West, most Muslim

countries (with the exception of a few oil-rich states in the Persian Gulf region) fall in the categories of the low- or middle-income countries. Of the 55 member states of the Organisation of the Islamic Conference (OIC) only five are classified as high income while 21 members belong to the middle group. The remaining 29 countries are classified as low income. The state of the widespread poverty, lack of social support system and high rate of illiteracy in the OIC countries was also confirmed by a report on the status of the economic and social development in Muslim countries. The report revealed that about 37 per cent of the population in the countries studied were suffering from extreme poverty and underdevelopment (Bashir, 2004). Consequently, the socioeconomic issues faced by peoples, organisations and society at large in Muslim countries are very different from those found in the West.

Third, in contrast to the predominantly secular character of the USA and other Western societies, people in Muslim majority countries generally appear to be more committed to religion in their everyday life. 'Islam, unlike many other religions', Tayeb (1997: 355) argues 'is an all-encompassing creed, it governs every aspect of life, public and private, political and economic, and as such is relevant to business activities'. In contrast to its status in Western societies where it is seen as one institution among many, religion is perceived as the bedrock of the societies in which Islam is practised (Lazreg, 1990: 329). To many people within the Islamic context, the idea of the withdrawal of religion from the public domain is not a priority;<sup>3</sup> hence any social or organisational discourse on gender and equal opportunity will continue to be influenced by religious thoughts (Iqbal, 1962). Acknowledgement of the importance of this influence might be difficult for some Western researchers, who could find it difficult to 'discard their usual dislike of religious topics and realise that . . . people of color . . . cannot be understood fully unless the central place of spirituality in their life is given serious consideration' (Stanfield, 1994: 185). For example, the Islamic revolution in (the 'fundamentalist') Iran and the resurgence of Islamist government in ('the modernist') Turkey represent the role of religion as a popular discourse in Muslim countries.

The fourth unique attribute of Muslim majority countries has a socio-political orientation, which is, nonetheless, important. Women's rights and human rights are highly contentious subjects in the contemporary Islamic societies, with a history of tensions between Euro-centric and anti-imperialist perspectives. The role of women in society is in many ways 'central to attempts to resist Western political, economic and cultural dominance in Islamic countries' (Baden, 1992: 1). In the aftermath of the 9/11 attacks on the USA and the subsequent wars in Afghanistan and Iraq, there is an increasing level of mistrust between Islamic and Western societies. In this

context, the concept of diversity and equal opportunity that hinges upon the 'Western' notions of human rights and women's rights runs the risk of being viewed as part of an imperialist agenda (NCTAUS, 2004: 363). It is, therefore, imperative that the concept and its implementation be carefully customised according to the local realities and requirements of Islamic societies. The context-specific approach is prudent so that diversity management does not suffer a backlash by those who currently hold power in Muslim majority countries, that is, the Muslim male elite (Chafetz, 1990; Chambers, 1997).

The foregoing suggests that the diversity management discourse cannot be contextualised without adequately identifying and understanding the unique attributes of the local sample. Once such attributes are identified, the next stage will be to recognise suitable indicators to gauge the achievements and deficiencies of extant or future diversity management initiatives.

### **Meaningful Indicators**

The third stage of contextualising the diversity management discourse pertains to the identification of meaningful indicators, based on which the phenomenon, theory and practice of diversity management can be compared across various national contexts. According to the relational perspective of diversity management (Syed and Özbilgin, 2007; in press), such indicators could be categorised into macro-national factors (such as socio-political policy, demographic composition of the population and the workforce, and historical context), meso-institutional factors (such as legal, institutional and organisational context of diversity management) and micro-individual factors (such as those related to individual personality and multiple identities). Unless cross-cultural transfer of diversity management discourse is pre-validated and gauged on such meaningful indicators, the diversity discourse in organisations and overall society will remain inadequate.

Reverting to the example of gender diversity management in Muslim majority countries, most widely used indicators on macro-national and meso-institutional levels include the female economic activity rate as a percentage of male economic activity, gender-wise income parity, female participation in decision-making roles, and industry/sector-wise data on female participation. Moreover, an in-depth investigation at the personal level will be necessary to identify the micro-level issues and challenges faced by diverse workers. At the micro level, such indicators may include demographic characteristics and the individual profile of such workers.

In keeping with the framework offered in Figure 7.1, it is imperative to develop and engage with a context-specific discourse of diversity

management. Without adequate contextualisation, it will remain difficult to identify the broad issues, challenges and prospects for managing diversity in non-Western contexts.

## CONCLUSION

This chapter has attempted to underscore the need for contextual scholarship and research on diversity management which focuses on local context. Deploying the case study of gender diversity management in Muslim majority countries, the chapter demonstrated why the 'mainstream' US model of gender equality may not hold equally well in other geographical territories.

The chapter proposes a framework for contextualising diversity management, which may be useful for future field research into the country- and region-specific perspectives of diversity management. The case study of gender diversity management in Muslim majority countries suggests that a context-specific approach is imperative because some of the apparent inequalities in such countries might be an outcome of the informed choices by women and men and might not signify actual inequalities in opportunities. What is the probability that not all gender gaps highlighted by gender-wise economic activity reflect lower opportunities for those who have lower outcomes (Klasen, 2004: 8)? Also, any differential labour market outcomes based on discrimination and social stereotypes may be redressed by deploying context-sensitive equal opportunity strategies. Contextualising the diversity management discourse may offer a realistic way forward.

## NOTES

1. Indeed, there is internal diversity within Muslim majority countries because of various interpretations and forms of Islamic practices.
2. In statistics, an outlier is a single observation far removed from the rest of the data.
3. Turkey is perhaps one exception; even there, there are some signs of change in view of the fact that Islamists are now at the centre-stage of political power.

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## 8. Exclusion, inclusion and women entrepreneurs

**Miri Lerner, Ayala Malach Pines and  
Dafna Schwartz**

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### INTRODUCTION

Women constitute one of the groups most susceptible to poverty (Pearce, 1990). Owning a business is one way for women, as well as other marginalized groups, to climb out of poverty (Izyumov and Razumnova, 2000). Through starting a small business, women can not only improve economically and socially, but also actualize themselves and improve their psychological well-being (Crossby, 1991; Barnett and Hyde, 2000). Self-employment is especially important for women who have difficulty finding employment because of limitations imposed by education, age, social marginality or language. In many countries in recent years, there has been a growing recognition of the economic potential in women's entrepreneurship, and as a result, the relative weight of women among business owners has grown (Acs et al., 2004; Moore, 2004). The establishment of independent businesses has been shown to increase the rate of development of the national economy in countries that were smart enough to encourage it (Minniti et al., 2004). In India, women entrepreneurs have been described as a ray of hope for economic development (Canesan et al., 2002). Nevertheless, the growth in the number and influence of women entrepreneurs is only at its early stages and the potential of this economic channel is enormous.

In the extensive literature on entrepreneurs (for example, Cooper and Gimeno 1992; Kets de Vries, 1996; Brandstaetter, 1997; Miner, 1997, 2000; Nicholson, 1998; Zimmerer and Scarborough, 2001) it is only in recent years that a growing number of studies have started focusing on women entrepreneurs (for example, Belcourt, 1990; Mulholland, 1996; Bruni et al., 2004; Boyd, 2005; Forson, 2006; Minniti and Nardone, 2007; Wagner, 2007).

The Global Entrepreneurship Monitor (GEM), which monitors the entrepreneurial activity in 40 countries, suggests that in all these countries the percentage of women entrepreneurs is lower than the percentage

of male entrepreneurs (Minniti et al., 2004). Interestingly, the percentage of women entrepreneurs is higher in countries in which the general income per capita is small and in which women have no other option for making a living. This fact has been explained as a result of the difference between ‘necessity’ and ‘opportunity’ entrepreneurship, with necessity entrepreneurship more prevalent among women (Reynolds et al., 2003; Allen et al., 2006). This chapter proposes a conceptual framework of social inclusion and exclusion for understanding these different types of female entrepreneurship.

## SOCIAL EXCLUSION AND INCLUSION

Social exclusion refers to ways in which individuals may become cut off from full involvement in the wider society (Giddens, 2006). While people may exclude themselves from aspects of mainstream society by turning down a job opportunity or becoming economically inactive, there are instances in which individuals are excluded through decisions which lie outside their own control. Thus, it is best to view social exclusion as the result of an interaction between human agency and responsibility and the role of social forces and circumstances.

Social exclusion and inclusion are about having access to critical assets and resources (Room, 1995). People and groups gain access to these assets and resources in many ways. The processes are organized through cultural systems of habits, rights, and entitlements that give priority to some over others, coordinate required activities, and condition the conflicts that emerge. One can be excluded from different institutions, social groups, special benefits or even particular events. Social exclusion is multidimensional and dynamic because it is a process that is highly conditional on time, place and circumstance.

Gordon et al. (2000) distinguished four dimensions of social exclusion including: poverty or exclusion from adequate income or resources; labor market exclusion; service exclusion; and exclusion from social relations. Labor market exclusion can lead to the other forms of social exclusion – poverty, service exclusion and exclusion from social relations (Giddens, 2006). Marginalized groups that are inactive in the labor market include women in domestic and caring activities. Labor market inactivity is not necessarily a sign of social exclusion in itself, because of the high proportion of the population that this involves, but exclusion from the labor market significantly increases the risk of social exclusion (ibid.).

Social exclusion is also multileveled since inclusion within a small

group can imply exclusion from the perspective of a larger group. Social exclusion includes both distributional and relational aspects. On the one hand it implies that some marginalized people or groups may be excluded from access to resources or services that are available to others. From this point of view the analysis of exclusion tends to focus on outcomes such as poverty, lack of access to services and stratification of various forms. On the other hand, exclusion implies that some people or groups may not be integrated into social networks or institutions that are available to others. From this point of view, analysis focuses on social relations, entry and exit into poverty and participation in various types of social institutions (Reimer, 2004).

Thus, processes of inclusion and exclusion must be analyzed in relation to institutions, in particular 'the decisive situations in which processes of exclusion are speeded or stopped. People do not face institutions directly, but interact with persons who function as gatekeepers representing institutionalized standards, such as civil servants who control access to social assistance' (Vobruba, 2000, p. 605), using policies that do not address women's needs (for example, maternity leave or a day off to care for a sick child).

## **WOMEN ENTREPRENEURS: A RESPONSE TO SOCIAL EXCLUSION**

Research indicates that ventures owned by women tend to underperform in financial/growth terms compared to male-owned firms (Srinivasan et al., 1994). Many studies have focused on the barriers women face as business owners, such as difficulties in balancing family life with the management of their ventures, difficulties in gaining access to capital and lack of information and assistance (Brush, 1990; Moore and Buttner, 1997).

Social exclusion provides a conceptual framework for understanding these barriers and helps explain the prevalence of women's necessity entrepreneurship. It suggests that social exclusion of women in the labor market pushes some women to become entrepreneurs. This also includes women in the corporate world. Studies show that some of these women became entrepreneurs due to feelings of exclusion from the male-dominated corporate organizations. Rosener (1989) reported, for example, that 70 percent of her women respondents had worked in a corporation prior to becoming entrepreneurs. Of these women entrepreneurs, 80 percent reported that in their prior positions, they had to work harder than men to advance. Similar findings were reported by Moore and Buttner (1997) in their study of women entrepreneurs. They found evidence of discrimination against

women in decisions concerning selection, promotion, performance, evolution, access to training opportunities and salary assignments. Salary discrimination was the most frequently reported form of discrimination, followed by bias in promotion and assignment of job responsibilities, selection, and hiring. These barriers and discrimination drove one of every five women out of the corporate world and into entrepreneurship.

Moore and Buttner conclude that entrepreneurship was women's way of moving beyond the glass ceiling imposed by the 'good old boys' system'. Since they felt excluded from the corporate culture in which they could not fit, these women were propelled into entrepreneurship. This process can be viewed as imposed by necessity rather than by seeing an opportunity.

Similarly, Moulton and Anderson (2005), who classify the motivation to start a business in terms of push and pull factors, suggest that push factors, such as flexibility to accommodate domestic roles, are more important to women.

According to GEM 2006 (Allen et al., 2006), prevalence rates of opportunity and necessity entrepreneurship vary across countries, but opportunity is the dominant motivation for most entrepreneurs. More than a third of all people involved in entrepreneurial activity are women, but low-income countries show the highest rates of female early-stage entrepreneurial activity, while high-income countries reported the lowest. Specifically: in low–middle-income countries, 35.8 percent of women, but only 28.5 percent of men, are necessity entrepreneurs. In contrast, in high-income countries, necessity entrepreneurship accounts for 14.7 percent of female and 13.4 percent of male activity. The work of women necessity entrepreneurs is characterized by lack of security and benefits, and by low income. This helps explain why despite entrepreneurship representing an important means to circumvent unemployment, the number of women who pursue an entrepreneurial opportunity, when other income-producing activities are available, is very low. An additional explanation is the difficulties women encounter in accessing information and sources of capital because they are unable to penetrate the relevant networks (Marlow and Patton, 2005; Abor and Biekoe, 2006; Alsos and Isaksen, 2006). In many countries women are excluded from social networks or informal networks of information (Brush, 1990, 1997; Lerner et al., 1997). In addition, money is of crucial importance in all aspects of exclusion/inclusion. A certain degree of income security is not a sufficient but a necessary condition for successful inclusion in society (Vobruba, 2000).

From the perspective of diversity – the focus of this volume – entrepreneurship can be viewed as a means of social inclusion for women and other marginalized groups in countries (especially in low-income countries) in which they suffer from social exclusion. According to the

GEM 2006 *Report on Women and Entrepreneurship*, globally, entrepreneurial activity is highest among women who are also employed in a wage job (whether full- or part-time). This suggests that work provides access to resources, social capital, and ideas that may aid in establishing an entrepreneurial venture. For the poorest and less educated, having some type of work experience provides a valuable platform toward starting a business (Allen et al., 2006). Entrepreneurship can offer such a platform for the poor and unemployed.

Three studies were conducted in recent years at Ben-Gurion University in Israel on women and entrepreneurship (Pines and Schwartz, 2007). Findings of the three studies combined show few consistent gender differences in entrepreneurial traits, values and abilities. In the first study, which involved a national survey of traits and attitudes related to entrepreneurship, a factor analysis performed on 17 entrepreneurial traits, revealed four factors. The first – entrepreneur – loaded highest on: risk taker, loves challenges, entrepreneurial, creative, has initiative, and wants self-actualization at work; it explained 25 percent of the variance, and showed no overall gender difference. Gender comparisons on the 17 traits showed few gender differences: men had greater self-confidence and emphasized status more, whereas women were more motivated by self-actualization and by security. These findings can be explained by evolutionary forces that select men who are self-confident, competitive and motivated by status (Buss and Schmitt, 1993) or by socialization forces (Henning and Jardim, 1978).

The second study involved 311 management students. It showed that about twice as many men than women either had a business or intended to start a business, men viewed themselves as more suitable to be and expressed greater preference for being business owners, and men described themselves as more entrepreneurial and as having greater business understanding than women. All these gender differences disappeared in the group of the students who either owned a business or intended to start a business.

The third study involved 101 Israeli small business owners. Gender comparison revealed far more similarities than differences: in work characteristics (for example, both were most often owners and managers of their business and worked primarily with people), the characteristics of their business (for example, similar age, similar percentage ownership, and a similar level of market penetration), their motivation for starting their business, the sense of significance it provided and the similarity in entrepreneurial traits.

The fact that the majority of the findings of the three studies showed no gender differences reinforces the explanation offered in this chapter for women's entrepreneurial inferiority as resulting from social and economic exclusion.

Finally, finding the explanations for women's entrepreneurial inferiority has global implications for three reasons: first, women constitute one of the marginalized groups that are most susceptible to poverty (Pearce, 1990); second, starting an independent business is an occupational channel through which women and other marginalized groups can advance economically (Izyumov and Razumnova, 2000), and third, women's entrepreneurship can be a route for national economic growth for low-income countries that encourage it (Minniti et al., 2004).

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# 9. Managing diverse social systems: diversity meets social systems theory – deconstructing binary and unfolding paradoxes

**Iris Koall and Verena Bruchhagen**

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## INTRODUCTION

Resistance to diversity management may arise if the privileges of dominant groups are affected or the perception of normalcy is threatened (Özbilgin and Tatli 2008). Adopting the assumption that organisational systems are regulated by elitist rather than democratic standards (Koall 2007), we argue that managing diversity can challenge hegemonic cultural assumptions within organisational processes. It offers the opportunity of systems evolution, counteracting the tendency of actors and constituent groups in modern organisations to avoid perceptions of difference and otherness against the spirit of using diversity to strengthen organisational viability. Our chapter is based on the premise that paradoxes are useful to develop the ambiguity (Lewis 2000) of reality, which is necessary in dealing with diversity issues. This premise calls for an examination of the complexity in systems thinking as communication in organisations and requires us to observe the inherent systemic paradoxes of organisational systems (Luhmann 1984, pp. 138ff.; Koall 2001, pp. 210ff.; Koall and Bruchhagen 2007).

## 1. APPLICATION OF DECONSTRUCTIVIST THEORY TO DIVERSITY

In this perspective, diversity discussions are connected to two theoretical streams: first, the theory of social systems (see the work of German sociologist Niklas Luhmann, especially 1984, 1997, 2002) and second, post-structuralist theory including deconstruction and paradox thinking (Foucault 1977; Derrida 1988; Butler 1993). This systemic-constructivist

approach to diversity (Koall and Bruchhagen 2002; Koall et al. 2002, 2007) refers to the idea of regulating diversity, with complexity in systems in mind. Systems are embedded in the social dynamics of complexity and are evolving structures and functions of internal, self-referential perception and communication (Nassehi 2005d, p. 571). Although social systems rely on the tendency to use order to reproduce themselves, in some cases it is possible or necessary to connect evolutionary perspectives with deconstruction of order (Fletcher 2003).

Besides these aspects of dealing with complexity – that is, ordering and deconstructing – there is the inherent tendency of complexity reduction within systems, especially as organisations are built to absorb insecurity and complexity. Luhmann (2000) puts the assumptions of March and Simon (1958) – that the organisational function is to absorb uncertainty – at the centre of his analysis (Seidl and Becker 2006, p. 27). Insecurity may be absorbed by the use of power. In constructivist communication theory, power works as an authoritative generalisation of communication. This allows for connecting interactions based on preferred or rejected sense, building symbolic order which structures communication independent of context and situation (Luhmann 1975 [2003], p. 31).

Complexity in systems is not always controllable; it produces contingency, irritation, iteration and change, and makes reactions of social systems unforeseeable (Luhmann 1984, pp. 45ff.). However, contingency is the situation in which complexity is organised, which means that communication and structure–function relations occur coincidentally but are not arbitrarily connected. In particular, one German gender debate that relies on systems theory uses the term contingency to describe how gender in organisation is both present and absent by thematising or de-thematising gender binary in communication (Pasero 1994; Koall 2001; Wilz 2004; Aulenbacher and Riegraf 2007). Contingency connects actual perception to the construction of the past, by using present interpretations of the past and interpreting on the basis of present knowledge. It is the paradox of the observer and the observed in reality construction. But, it broadens to perceive the diversity and power relatedness of *present* interpretations, and even the relevance or non-relevance of depending on past paths.

Systems theory, according to Luhmann (2006), is somewhat present orientated (Nassehi 2005a, p. 182, 2005b) about observing how the current reproduction of the system works: autopoietical by communication, limited by vivid control of the system over means, boundaries and functions of communication (Nassehi 2005a, p. 180, 2005c, 2005d; Elder-Vass 2007, p. 419). There is nearly always overspill in meaning or sense, and reflection may allow perceptions and decisions besides traditional assumptions. The

contingent use of sense offers the opportunity for change. Path-dependency (Walby 2007) approaches, which call for systems complexity, are much more likely to avoid than to use complexity by perceiving development according to assumed structural development. Luhmann (1984, p. 383) perceives systems structures as self-referential expectations, which are essential to connect up with emerging systems and to transform unstructured into structured complexity, but within contingent settings of performance, function and reflection. Walby (2007, pp. 449, 457) restricts Luhmann's interpretation and his sociological research by either simply rejecting it or confusing it with Talcott Parsons's (1951) system approaches. She uses theoretical assumptions which tend to hinder complexity by referring to ontological, path-dependent theory constitution (*ibid.*, p. 454). However, this provides an opportunity for theoretical clarification.

Luhmann rejects structural and ontological foundations of theory. Within Luhmann's systems thinking, path dependency would be described as undercomplex, because of its failure to reflect the epistemological and ontological assumptions of time construction in paths and space. Path dependency relies on the assumption of derived development. Luhmann puts functions (rather than social distinctions and structures) at the centre of his analysis by describing them as self-referential occurrences of systems to connect internal and external tasks and perception, which are forcing structure to emerge (Nassehi 2005a, p. 181). But probably most relevant is his transferring of action into present communication within inclusive networks (Elder-Vass 2007, p. 420). He transforms past and actual, even future events into mediated communication. Even if the actor of an event disappears, communication can be stored, operated and continued by using media (language, sense, money, love, power) forms and codes (Luhmann 1997, pp. 210ff.). The subject works as a carrier of communication and differentiation. This de-ontologises the diversity discourse by refusing to take actors as reference for the construction of social differences.

Luhmann's systems thinking relies on the critical observations of this linear or cyclic thinking. He problematised the inherent suggestive moves towards a non-defined status. For Luhmann, the past is a present interpretation and the future is described by present options of observation. The future depends on the circumstances to connect present communication with an expected (future) meaning. In conventional time constructions, future seems to be new and the past seems to be known, but this is a normalcy producing events, which should keep irritation apart. For Luhmann, time is a powerful, hegemonic construction to build order and support or suppress change. Time constructions are used to perform future signification or meaning (*ibid.*, pp. 998ff.) and the past is stored in

the cultural memories of the present and is rather an interpretative than an ontological entity (pp. 1005ff.).

For Walby (2007), path dependency is implicitly a development within stages in time and space as past, present and future. This leads to institutional domains of rather ontological descriptions about gender and race. There is no scepticism against reification of essentialist differences, based on binary distinctions. Luhmann labels ontological thinking as 'old-european', as it is far from being an adequate social theory to meet the challenges of modern or post-modern societies (Luhmann 1997, p. 895) since it relies on ontological binary distinctions of being and not being. Walby's (2007) ontological approach suffers to reflect the paradox construction of reality. Ontological thinking relates to theory possibilities based on pre-flexion or assumptions about a desired or favoured future development. An exemplified path-dependent development is a moral standard, which is excluding to analyse the power of communicative reality construction and is hindering change by relating to normative standards of path dependency (Luhmann 1984, p. 437). And this might lead to the same controversial outcomes, such as debates between proponents of functional and normative theory orientations.

For Luhmann, complexity is inherent in systems. A social system needs the capacity to rely on self-referent descriptions to 'develop and sustain a degree of complexity that enables them to respond appropriately to their environments' (Elder-Vass 2007, p. 413). Organisations as social systems use their self-descriptions to regulate themselves, which build and perform their inherent functions of performance and employment or vice versa are building their capacity to observe themselves according to their assumed functional relations (Nassehi 2005a). And similar organisations inherently develop their capacity to deal with diversity issues (Zannoni and Janssens 2003).

Complexity perception is based on the ability of second-order observation, which reports how self-reference is made on the basis of used distinctions (*Leitdifferenz*). Perception is related to this mostly binary and hierarchical use of distinctions (Luhmann 1984, pp. 45ff.). There is a kind of operational paradox in the distinction between self and environment. It recurs in the interdependence of self-description and concurrent environment perception. Either homogeneity or heterogeneity in a system occurs due to the selected modes of distinction between self and the environment. Homogeneity might be defined as a known or an unknown decision to restrict the self-reproduction and self-management of systems. The ideals of diversity and inclusion are self-descriptions of a system's capacity to observe and evolve itself. Therefore, the main emphasis is on unfolding complexity (Luhmann 1990) rather than reducing it.

But, systems tend to reduce complexity by homogenisation, which is then connected to the functions of the system. They are able to connect homogenisation and functionality

- by connecting to social categories;
- by evaluating performance and decisions based on binary distinctions; and
- by making hierarchical information channels reliable to social differences (Koall 2001, pp. 90ff., 244).

Resistance against heterogeneity is a part of the structure of a system and relies on functional assumptions in organisations. Heterogeneity can be defined as a property of a system, which arises only if it is allowed to be functionally equivalent (*ibid.*, pp. 201ff.). Heterogeneity might be observed as complexity, if the elements are more contingent connectable than controllable, in the sense of non-foreseeable reactions of the system.

Complexity requires systems (societies, organisations, interactions, and people) to be heterogeneous rather than homogenising internal diversity by dominance or path dependency. Social systems might reduce complexity in perception and reality construction or enhance the capability of complexity perception,

- by understanding, how social systems are avoiding complexity in communication through the use of binary distinctions (2.1); and
- by reflecting and deconstructing the use of binary distinctions and relating them to the unfolding of paradoxes (2.2).

## 2. COMPLEXITY IN SOCIAL SYSTEMS

### 2.1 Complexity in Organisations Reduced

There are three different kinds of social communication relevant in Luhmann's (1984, 1997, 2002) systems thinking: in society, within organisations and interactions. Society consists in subsystems of economics, education, politics, law, religion and art. They are neither hierarchical ordered nor made responsible for a special function (as in Parsons's sociology) – except for processing communication. This so-called 'autopoietical' closed system operates and reacts within its own functionality and forwardness. The subsystems work by referring to their own operations, but this does not mean that they operate independently. However, within an economic system, it is mostly the economic functionality that is accepted as the

communication reference. This does not mean that other events beside economic events are not occurring, but they need to be transferred into economic semantics and functions.

Communicative meaning must be connected to functions and make sense. That is why diversity issues – moral, legal, and philosophical – are so difficult to transfer into the management context, and can be grasped only if they are transferred into economic values or diversity business cases. For example, only if the rejection of legislative regulations is costing money will a company react, otherwise this is the wrong choice (Tatli and Özbilgin 2007). Different subsystems can relate with each other by offering structural complexity for autopoietical or sensemaking tasks, but always with reference to their own functional relations. Systems can exchange structural relations, for example from educational to economic systems. These interpenetrative communicative connections are also performed by the person who is transferring communication and are able to be part of different systems. These inter- and intrapersonal communications might work like parasites (Serres 1987 [1984]; Luhmann 1997, p. 661; Nassehi 2004) using foreign resources for the own autopoietical process. This parasitic ability is relevant for diversity change processes. It provides the opportunity to build and connect different system semantics and orders – it offers perspectives and reactions in an unintended way.

Second, there are organisations as a special type of social systems with inclusive and exclusive membership rules and expectations, generating and operating on the basis of decisions, which can only be legitimated *ex post*, and are using the role of leadership to attribute decisions to persons. Systems theory is a theory of observation and performs in the present to analyse and deconstruct communication (Nassehi 2005a). How does communication work and what kind of distinctions are made to produce social differences in systems to be able to observe and operate its autopoietic process? If binary distinctions are made to evaluate and devaluate social processes to foster hegemonic perception, essentialist stereotyping might be observed in its relation to power and dominance in social systems. Luhmann (1997, pp. 555ff., 873, 1147) appreciated using deconstructive epistemology to support evolution of social systems and theoretical perceptions. Deconstructive perspectives are able to connect irritation with conventional forms of communication. Using deconstructionist epistemology (Foucault 1977; Derrida 1988), it might be possible to observe if and how binary distinctions are suppressing diversity in organisations (Koall 2001). Therefore, we shall look at the post-modern deconstruction of the self, the supplementary logic, which constitutes the division of the one and the other, the normatively charged differences as difference, and the power-related constitution of performative and polyvalent discourses.



(Pre-)modern identity constructions rely on the idea of a *continuous* and *authentic* self (of sex, gender, age, race, heteronormativity . . .), which is powerfully separating the *one* from the *other*. By contrast, some theoretical approaches describe how dominance of written language includes and excludes meanings to construct a perception of identical self (Derrida 1988; Gherardi 1995). Perspectives of identification are having the unintended implication of bounding cognitions and emotions (as perceiving or expressing). Communicative codes – in the case of individuals, the code of friendship and love – rely on and use social structures of systems to describe personal intimate relations with connection to and differentiation from the social system (Luhmann 1982). In complex social systems, there is ambivalence and contingency. Post-structuralists use the ‘hierarchical structure of thought to reinscribe the conceptual terms and situate them differently’ (Chia 1996, p. 186). Diversity approaches are used to de- and reconstruct contextual and functional identities in organisations. This means iterating binary distinctions, confronting them with ambivalence and uncertainty. Systems theory perceives ‘identity’ as an inherent construction of the system, to offer a reference for self-observation, which keeps self-reproduction going (Luhmann 1984; Nassehi 2005a). With regard to diversity issues, it would be useful to observe in organisations how identity construction for homogenisation is used and where space for deconstruction (see below) may occur.

Most hegemonic positions need to devalue the other, but also to suppress how the other works as a necessary *supplement* to stabilising an exclusive position. Derrida (1974 [1991]) refers to normative legitimised existence, which cannot live without (mostly suppressed) supplementary logic. Where there is the double standard of making distinctions and imbuing them with normativity, without referring to nuances and counterdependence, a supplementary logic might enable us to develop the supremacy of objective standards of evaluation. Diversity works by releasing the supplementary logic of binary distinctions in referring to the necessary stabilising work done by the other devaluated part, and refers to the accomplishment of the covered latency. But the distinction between public and concealed manners is one of the most powerful means to control objects and subject in cognition, body and emotion.

These refer to the mode of making distinctions as ‘difference’. If we are relying on spatial, time and social movements or decisions to legitimate differences, it comes to the term ‘*differance*’ (ibid.). Differences are made to perform power. Oppositions are formed to legitimise conventional hierarchies. As in systems thinking we might observe distinctions as being necessary to signify (Luhmann 1984; Nassehi 2005a), we might refer to post-structuralist thinking (Derrida 1988) that the term to describe

(signified) might be seen as being different from the object of description (significifier). But the term reduces and focuses the use and perception of the object and if terms or definitions work as oppositions, they are likely to be reloaded with normativity and ordered in hierarchies. Like (gender) differences, which are experienced as fragmented by being thrown into factual being (Heidegger's '*Geworfen sein*'), there is the capacity to evaluate the powerful normativity which uses spatial and time processes and distinctions to function as gender oppositions, because the unity of the oppositions must be familiar in order to oppose them (Gherardi 1995).

Another way to uncover binary distinctions in organisations is through observation and by dismantling power structures within performative discourses. Constitutive conditions of power by discourses are rules of immanence (Foucault 1977), which are: (i) to constitute the domain to describe the object and contain and limit its relevance and validity. Also, the domain of an object legitimates inherent necessities, and formulates rationales and causes for strategies; (ii) to maintain the power and to define the ambit of strategies there are relevant rules of continuous variation and modification of powerful relations; (iii) there is continuing support and connection of strategic and tactic in discourses; and (iv) a technical polyvalence of discourse enables us to modify and cover rules of power, for example, how formal and informal arrangements are distinguished and exceptions are made and legitimised. This more procedural than structural constitution of power demonstrates the fragility and dependence on public acceptance. It also shows the toeholds of intervention or irritation.

Luhmann (1975 [2003]) defined power in a rather neutral sense as simply a medium to regulate communication, which enables action (as communication) from the ego to be accepted by the alter. The power that the ego is using generates motivation of the alter to act in the sense that the ego intended. Power is constituted interdependently and does not rely on compulsion. This shows the synergy in the use of deconstructivist and system-theoretical approaches. Systems theory explains how, despite ambivalence, paradox and complexity, order and meaningful communication can occur by using communicative media, forms and codes (Luhmann 1997, pp. 198ff.). And deconstructivist approaches offer insights into the discursive construction of power within this paradox-ordering process.

## **2.2 Complexity in Organisations used by Unfolding**

According to Luhmann's theory of social systems, paradoxes are constructed to make complexity, ambivalence and ambiguity invisible. Complex social systems are paradox systems (Luhmann 1997, p. 136). Paradoxes occur in self-referential systems by negation, where one

assumption of realising an idea or action is contradictory to the intended result. Any contradiction is not necessarily a paradox, as long as it can be avoided or healed. A paradox can only be made invisible (Luhmann 1986, p. 268). A developed, not suppressed, paradox raises the complexity of systems by showing how normalcy relies on distinctions to force perception to observe only one side of a distinction. It is also called the 'blind spot', by using only slices of possible realities. If we follow the assumption that organisations as social systems are constituted by decisions (Luhmann 2002, 2006) and the communication about decisions, we might gain access to paradoxes in organisations. There is the example of the paradoxical constitution of the communication about a decision. Every organisational communication about a decision has two sides, one inside (the chosen one) and one outside (the rejected alternative). An alternative could also be on the inside of the form of the communicated decision, otherwise it would not be an alternative, and a chosen decision should be constructed in a way that it could also be an alternative. There is no clear divide between inside and outside, but only a decision about the decision.

The idea of overcoming or 'healing' paradoxes by dialectic integration (Vieira Da Cunha et al. 2002, pp. 14ff.) is to deal with contradictions and conflicts, by iteration and balancing (p. 31), but not to unfold paradoxes and complexity. Rather, paradoxes are present, and their avoidance is needed to maintain rational and predictable reality, enabling the self or the management process to act (Baecker 2001). Systems use binary – such as dialectic – distinctions to reduce complexity and force ambivalence and ambiguity to disappear while also trying to make this ambiguity invisible by using paradoxes: 'Complex systems are social because this is their only way to both unfold and reproduce their paradox, which consists in having to combine unity and variety, or operational closure and structures of reproduction' (Baecker 2007, p. 1).

Working without binary distinctions means explaining how actors and a certain constitution of modern organisations are enabled to avoid stereotyping rather than using the spirit of diversity to strengthen organisational viability. Diversity management might make fruitful use of this general issue of managing paradoxes. Paradoxes are a sign of rising complexity (Clegg 2002; Vieira Da Cunha et al. 2002), showing the vulnerability of dichotomies such as emotions and cognitions or classical management distinctions between 'rational systems' and the 'bounded rationality of the actor' (Mumby and Putnam 1992).

One of the most viable functions of complexity reduction is to remove paradoxes of distinctions. We might consider the assumption in systems thinking that paradoxes are present and needed because their avoidance is almost necessary to construct rational and predictable reality in

organisations, and enables the ‘self’ to be distinguished from the ‘other’ and capable of acting.

Lewis (2000, p. 761) describes paradoxes as forms that exclude ambivalence and complex interrelationships. Unfolding paradoxes confront dominant organisational cultures with their ambiguity of change and stability. Thus pointing to the paradox constitution of the task of managing diversity. Özbilgin and Tatli (2008, p. 46) ask for ‘unpacking the paradoxes [as] essential in order for diversity management to be adopted as an overarching philosophy’. We rely on two theoretical streams – the theory of social systems and the post-structuralist theory of deconstructing binary distinctions – to follow these considerations to support the idea of an overarching diversity theory.

### 3. PARADOXES UNFOLDED

A paradox might be defined as a status or problem where one assumption of realising an idea or action is contradictory to the intended result even though the intended status cannot be achieved without this idea. Paradoxes are constructed to make complexity – rooted in ambivalence and ambiguity – invisible and to maintain the ideas of calculated rationality and predictability. Paradoxes show that a certain problem cannot be solved within the chosen framework of thinking and acting. Paradoxes challenge the foundations of certain assumptions about reality construction.

Therefore, unfolding paradoxes might work as a kind of beneficial irritant which offers opportunities to evolve a wider frame of recognition, explanation or observation. The social distinction of ‘self/otherness’ and the time distinction of ‘before/after’ are forms of differentiation that cover the difficulties of making distinctions, using differences and enabling us to perform rationally (Baecker 2007).

In our perception, diversity discourse relates to three paradoxes (Koall and Bruchhagen 2007):

- the paradox of equity in difference;
- the paradox of individual differences and group identity in one person; and
- the paradox of tolerance of the intolerant.

#### 3.1 The Paradox of Equity in Difference

The first paradox of managing diversity concepts and probability of diversity in action is founded on the claim of enabling equal treatment

of social differences or non-equity (Lindsay 1993). If we look at diversity in organisations, we have to deal with social differences of race, gender, age, sexual orientation, class, social attitudes and much more, and try to develop structures and instruments to minister social justice. Here, the assumption of difference confronts the modern standard of equality. It might be observed – as experienced in gender equality concepts – how it works on the level of discourse and helps to develop the perception of discrimination. But it might also show how ambivalence is sliced into binary distinctions of black/white, male/female, senior/junior, and homosexual/heterosexual. Subjects are not to be cut into slices but are contextually and intersectionally situated identities in organisations (McCall 2005; Bruchhagen and Koall 2007). However, binary distinctions are part of standards of justice (Lenz 1992). To achieve justice one has to distinguish and define a standard of excellence to which everything else can be compared as fitting or not. Furthermore, this comparison to a standard of excellence is part of a dominant culture, although it must be covered by a paradoxical construction of reality. For example, career opportunities of minority members – such as mothers and fathers – are related to hegemonic, masculine working schedules and (un)limited access to and use of reproductive resources.

In dealing with diversity issues, the challenge is to deconstruct these hegemonic norms and standards (Koall 2001; Bendl 2005) which regulate the inside and the outside as access to resources of power and well-being or, more pragmatically, to career paths. Deconstruction might show students and professionals how reality relies on normative assumptions about implicitly used unquestioned normalcy and power relations. Deconstructive work in classes (Koall and Bruchhagen 2002) and counselling processes (Fletcher et al. 2006) shows how in organisations, discourses are constructed along repressive hetero-normative lines (Foucault 1977), and how diverse perspectives and experiences of life and work are rejected and constructed as either anti-social or inefficient.

### **3.2 The Paradox of Individual Differences and Group Identity in One Person**

The second paradox relies on the definition of diversity that subjects are defined by their individuality as well as by their group provenance (Nkomo and Cox 1999; Lewis 2000, p. 768). Ascriptions can be re- and deconstructed in organisations with deconstructive instruments, as shown above. Paradoxes cover this ambiguity and allow stereotyping, experienced in the biographical frame and stored as perception expectations (Kulik and Bainbridge 2006). Even culturally marked names or postcodes

work as group or social class markers or signifiers to devalue or appraise an unknown person by reactivating group stereotyping (Tatli and Özbilgin 2007). Ambiguity is forced in an interaction or organisational situation, if social differences are used to regulate complexity. On the organisational level, homogenisation allows a focus on a certain – dominantly selected – social reality (Koall 2001, pp. 175ff.).

To develop the construction of social categories and to deconstruct social categories we make differences relative by focusing on social processes and the complex reasons for constructing and using differences (Koall 2001; Luhmann 2006). The paradox of individuality and group provenance can be unravelled if one asks what function social differences have for systems, such as following ‘objective rules’ and performing individual rule breaking by supplementary logic and variations of discourses. It can be shown whether:

- ambiguity can be expected;
- a distinction can be made between the observer and the object of observation, or in deconstructivist terms, the signifier and the signified; and
- the cultural process can be reflected in which words are used as descriptions which are formed within normatively loaded cultural processes to shift the boundary between ‘abbreviation’ and ‘normalcy’.

### **3.3 Tolerance of the Intolerant?**

The third paradox refers to political and ethical diversity issues: ‘Must we tolerate intolerance?’. This could involve the managing diversity discourse which has the implicit notion of learning to be tolerant of otherness. However, this is not quite possible within the binary distinction and the paradoxical constitution of either rejecting or accepting positions. This relates to modern constitutions of business ethics where discrimination continues as long as there is no legal case resulting in increased costs. No ethical coordination of social processes is possible, and we need to make this distinction in different kinds of systems. Individuals can be seen in the context of their own interests and also what they offer can be observed as a normative approach which might be constructing and legitimating motives of acting and deciding. If companies as social systems are touched by diversity issues, they do this to avoid endangering their normalcy and so develop ethical standards to avoid getting in moral conflicts. Teams are able to overcome homophobic tendencies and can operate within diverse cultures and actions, in case they are enabled to work on their emotional

and cognitive configurations and reflect internal motivations (Bacharach et al. 2005). Ethical issues are applicable only in separate subsystems, so it might be important to determine what is the evocative issue that relates to my or their motives of action or mind construction. Why does someone or something feel threatened or protected by certain values which are not independent of their perception of identity? We can look at the legitimating function of the other mind which (or who) claims the freedom of its/her/his own motives.

#### 4. CONCLUDING NOTE

In this chapter we have examined a theoretical framing of diversity challenges by designing complex social systems as paradox-producing and -using systems. Unfolding paradoxes support development towards system flexibility and change in addition to stimulating sociological theory development, like the Habermas–Luhmann debate in 1971. The political sociologist Jürgen Habermas (1981) developed his theory around the idea of whether discursive practices allow change by reverse impact of discriminative structures of rationalisation. He described power relations as performative rationality in capitalistic society with overwhelming influence on '*lebensweltliche*' non-capitalistic, non-repressive relations (ibid., Vol. 1, p. 461). But this vision was Luhmann's main allegation against Habermas. Luhmann criticised Habermas's final-causal social theory, beginning with the expected end of a future realised emancipatory process (like the dialectics of Marx), because every critique needs an exceptional vision of the wanted future. In his turn, Habermas reproached Luhmann for being interested only in social order and observation and therefore stabilising capitalist society. Recognising the controversies between critical theory and constructivist system theory (Habermas and Luhmann 1971), might reopen the dispute concerning the political claims and limited options of (post-) modern social theory. But this controversy shows only two sides of the paradox constitution of theory. Neither Luhmann's functional–structural observation nor Habermas's political criticising, could avoid paradoxes. There are always preconditions, such as time- and space-dependent observation and no power-free discourse, which hinders or enables discovery of the 'truth' (Füllsack 1998). There are always past preconditions which are observer-dependent blind spots. There is no power-free, legitimate space and time: even the diversity discussion is part of this – and tries to cover it with paradoxes. Unravelling paradoxes may show that there is no practical escape from the demands of heterogeneity, even if it is a nice try to reduce complexity by campaigning for divided theories.

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## 10. The value of seeing gender as a ‘doing’

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### INTRODUCTION

Seeing gender as a social practice has been a burgeoning topic in research on gender at work in recent years. This reflects a theoretical shift in gender studies towards constructivist and post-structuralist approaches. However in much research on gender at work, gender is still seen as a variable or a property of persons. In this chapter it is argued that such a view theoretically narrows the impact that research on gender at work could have. First, approaches to gender at work are reviewed to show that most studies have focused on a limited array of theories. Second, theories of gender as a social practice arising from gender theories are outlined. Subsequently, the application of those theories for research on gender at work is highlighted before we draw some conclusions and stress the implications that seeing gender as a social practice may have.

### TUNNEL VISION?

Studies in the field of gender at work are flourishing. Studies have focused on gender differences in relation to job satisfaction (García-Bernal et al., 2005; Mason, 1997; Okpara et al., 2005) and management and leadership styles (Helgesen, 1990; Rosener, 1990; Eagly and Johannesen-Schmidt, 2001; Hau-Siu Chow, 2005). Studies also dealt with equal opportunities (Strachan et al., 2004; Burke, 2005; Metcalfe and Afanassieva, 2005) and issues around family friendliness (Grover and Crooker, 1995; Greenhaus, 1999; Konrad and Mangel, 2000; Linehan and Walsh, 2000; Lewis, 2001; Veiga et al., 2004), work–life balance (Drew and Murtagh, 2005) and working hours (Simpson, 1998). Another prominent area of research is related to women’s careers (Simpson, 1997; Duignan and Iaquinto, 2005) and women’s networks (Ibarra, 1992, 1993). Metaphors such as ‘glass ceiling’ or ‘sticky floor’ have reached prominence (Powell, 1999; Baxter

and Wright, 2000; Wirth, 2001; Cornelius and Skinner, 2005) as have social psychological research approaches on stereotypes which aim at explaining the discrimination of women at work (Heilman, 2001; Kray et al., 2001, 2002; Schein, 2001; Roberson and Kulik, 2007).

The aim of most studies is thus to identify differences and sometimes also similarities between groups of men and women. Researching 'gender' is often equated with researching 'women' and sometimes, but less frequently, 'men' as pre-established groups. Researchers split their samples based on gender, and gender then becomes a variable that is used in models to test what impact it has on other elements under research (Harding, 1986; Alvesson and Billing, 2002). Such a perspective certainly has value in that it highlights gender differences and is a leap forward from earlier studies in which gender was not deemed important at all (compare Acker and Houten, 1992). However, such an approach does not allow testing for similarities, which means that gender is always conceptualised as difference (Hyde, 2005).

While such a perspective can be important to describe today's situation of women and, to a lesser extent, men at work, this research is problematic as it may lead to essentialism. Essentialism would mean in this case to (re)produce gender difference which is the expected outcome of research. In other words, we might find what we were looking for (Goffman, 1977; see also Ofori-Dankwa and Ricks, 2000). Only a few studies question the assumption that there are things like a 'female' management style (Wajzman, 1996) or something like 'feminine leadership' (Billing and Alvesson, 2000; Fletcher, 2004). The idea of a 'female management style' is often based on the assumption that a generic woman enacts this style. Thereby any differences among women are disallowed (Marecek, 1995, p. 163). If there is a generic woman enacting a certain type of management style, potential individual differences between women are glossed over as preference is given to seeing women as a group. Second, talking about gender is very often simply equated with women while men are rarely talked about or analysed. Women are thus constructed as a problematic group, while men in management tend to remain the unquestioned taken-for-granted norm (Calás and Smircich, 1992a, 1992b, 1993; Collinson, 1992; Kerfoot and Knights, 1993, 1996; Collinson and Hearn, 1996; Martin and Collinson, 2002).

From a gender studies perspective, the understanding of gender predominant in management research is built to a large degree on early feminist work in which it was central to make women's voices heard and to make political claims on behalf of women (Gilligan, 1982; Hartsock, 1987). However, within feminist theory this understanding has been widely criticised as essentialist. The 'woman' constructed through these approaches

was a white, heterosexual, middle-class woman. Other women's interests and differences between women were glossed over (Amos and Parmar, 1984; Mohanty, 1986, 2003; Spelman, 1988; Ramazanoglu, 1989). This has led to many critiques from writers on class and 'race' but most notably meant that the notion of 'woman' became increasingly questioned and put under scrutiny. For example, Judith Butler argues in her influential book *Gender Trouble* (1990) that feminism constructs the subject of which it speaks, women, and rather than liberating women it constrains who counts as a woman. In the wake of these groundbreaking theories, an attempt has been made to research women in a non-essentialising way.

## GENDER AS A SOCIAL PROCESS

Based on these theories of gender as a social process (West and Zimmerman, 1987; Butler, 1990, 2004; Bruni et al., 2005), gender became conceptualised as something flexible and fluid and something one *does* rather than one *is*. Like the famous statement of de Beauvoir (1949 [1993]) suggests, one is not born a woman but becomes a woman. Recent gender theorists have worked with this assumption and have started to show how gender is created as a continual practice. People enact gender and thereby become gendered beings. It is argued in this chapter that such a perspective of gender as a 'doing' not only reduces essentialist views of gender but might also be a vital research perspective.

Two of these bodies of work treating gender as a social process have been predominant in gender theories. First, the ethnomethodological approach developed by West and Zimmerman (1987), who conceptualise gender as a routine accomplishment in social interactions. They analyse why gender is perceived as being constructed outside the situation and people operate on the understanding that two distinct categories, women and men, exist. However, the central point of the analysis is to show how gender is created in the situation rather than existing a priori. In order to be categorised as a man or a woman, interactional work has to be done. This interactional work is under constant risk of gender assessment as one is accountable for 'doing' gender. According to West and Zimmerman, one can never not do gender as long as it is such an integral part of a society.

The second theory of gender as a process derives from Butler's (1990, 1993, 2004) work. In her critique of the feminist construction of the stable subject 'woman', Butler develops a critical genealogy of gender categories in which she explores why gender is perceived as something stable even though it is enacted in the situation. Although her aims appear similar to those of West and Zimmerman's, she draws mainly on post-structuralist

theories. A central concept in her work is that of 'performativity'. There is much debate about what performativity means (Lloyd, 1999; McIlvenny, 2002; Brickell, 2005), but in a nutshell one may summarise it as the process of how gendered subjects are constituted by regulatory notions within a heterosexual matrix.

For Butler, subjects are constructed by which positions the discourse allows. Some of these positions speak to or 'interpellate' persons and in orientating towards these discourses, subjects are reinstated. Butler, for instance, refers to 'girling the girl' as a gendering moment. When a baby is born the label 'girl' or 'boy' is assigned to the baby and this calls the baby as gendered into being. The baby girl thus is interpellated and in responding to this hailing, the person starts to create herself as a woman. In citing these gendered subject positions, people render themselves legible but at the same time what is legible as a human being is defined on a narrow band. Which subjects can be formed depends on the restrictive and profoundly heterosexual gender norms.

## EMPIRICAL APPLICATION

Both approaches to seeing gender as a social process conceptualise gender as an ongoing activity or a 'doing' within everyday life. Organisational researchers have been at the forefront of adopting such 'doing gender' concepts and developing them further for research on gender at work. Approaches to gender at work which see gender as a process have flourished in recent years with the insight that research of gender at work should go beyond 'counting bodies' (Alvesson and Billing, 2002). They are part of approaches which see gender as socially constructed.

Gherardi (1994) theorised gender as a social practice that functions to create gender difference. She outlines two practices: symbolic work, which is the unquestioned gender order, and remedial work, through which the gender hierarchy is re-established when it has been challenged. Symbolic and remedial work are practised together in organisations and lead to the gender segregation remaining stable through situational enactments.

Martin (2003) analysed this phenomenon based on the fact that people practise gender at work, but also that organisational structure dictates a certain way in which gender is done. Research focused on how, through the way in which gender is done at work, similar jobs get gendered differently (Leidner, 1991; Hall, 1993). Leidner (1991), for instance, highlighted how two different jobs drawing on very similar skills are gendered completely differently. She studied selling insurance and selling hamburgers and found that in both areas the performance stylised in prescriptive

interaction norms required is rather similar. Even though similar things are done, selling insurance was seen in this case as something that men do, while selling hamburgers was seen as something that women do. Hall (1993) has shown how gender differentiation in similar jobs in service work takes place through subtle distinctions. In her case, she studied waiting and waitressing, the latter gendered feminine while the former is gendered masculine. In both instances, people serve at table but she shows how through different uniforms and forms of interaction a firm gender boundary between these types of work is established. In these cases, organisational rules and regulations lead to certain forms of gender being enacted while a job, is being done.

A major concern of studies has also been the notion of hierarchy. Hierarchy refers to the idea that certain actions are evaluated differently depending on whether men or women do them. Illustrative for this is a study on an employment office (Korvajärvi, 1998). Here it is shown that women often adopted a style of listening to customers and helping them while men rather followed the path of fulfilling their targets. However, men's styles were evaluated more highly because they were more efficient even though women's styles potentially led to higher customer satisfaction. Studies of 'doing gender' in organisations focus on how gender differentiation, hierarchy, and asymmetry are maintained through the enactment of gender at work.

Studies on doing gender at work are also particularly useful in showing the flexibility of gender. Leidner's work (1991) could again function as an example as she highlighted how similar tasks get gendered differently. Another example is provided by Pierce (1996) who shows that emotional labour, which is often seen as something feminine, is performed by men in the masculine profession of litigation. This is particularly interesting because recent commentators have claimed that professions such as management are becoming feminised. This means that the skills needed are those associated with women (Helgesen, 1990; Rosener, 1990; Fondas, 1997; Sharpe, 2000). However, these claims have not yet led to a better representation of women in senior management (Catalyst, 2006; Singh and Vinnicombe, 2006). Fletcher (1999, 2004) argues that this is the case because the skills women are said to bring are not necessarily recognised as such. The feminine skills that women are assumed to bring often remain under the radar and are accepted as normal for women. However, feminine skills are rarely regarded as a specific skill or competence in women.

We came to similar conclusions in our own work. In information technology (IT) work it is often asserted that women bring the soft skills that such work needs (Kelan, 2008). It is argued that it is no longer enough to be a technically versed hacker as IT work is increasingly service work

and IT workers have to understand themselves as customer focused. Since women are assumed to bring people skills which in turn would enhance the customer focus, this argument is regularly deployed to argue for more women in this profession. In this study it was explored how the ideal ICT worker is gendered. People described the ideal ICT worker as having a mix of technical and social competencies and this portrayal was gender neutral. In other parts of the interviews it was argued that there should be more women in IT work since they bring social competence to work. These discourses were rarely connected to the gender-neutral ideal worker portrayal. What is more, this research highlights that the skill evaluation is thus that men are rewarded for showing social skills as they have to work harder to display them. Social skills in women were rewarded less, simply because it was assumed that those skills come naturally to women and women do not need to work hard to display them. This study shows how the gendering of skills differs in different contexts. It also highlights how the meaning of 'doing gender' can be very different, depending on the context in which it is deployed. Researchers studying 'doing gender' therefore have to pay careful attention to what is seen by the research participants as well as the researchers themselves as gendered and how that differs in different contexts (see also Nentwich, 2004, 2006).

## CONCLUSIONS AND IMPLICATIONS

As we have argued elsewhere (Nentwich and Kelan, 2007), the application of 'doing gender' is by no means without problems. However, seeing gender as a social process provides researchers with fresh insight on how gender is done at work. It transcends – or at least problematises – the essentialist assumptions entailed in much research on gender at work since it shows how gender is constructed in a situation rather than conceptualising gender as a variable. An understanding of gender as a social process allows researchers to analyse how gender segregation is retained in a work context through interactional achievements. Organisations are also gendered in so far as they invoke certain ways in which gender ought to be done. 'Doing gender' is linked to doing hierarchies where the masculine is valued higher than the feminine. Gender itself is highly flexible and what is gendered feminine in one context could be gendered masculine in another. A shift towards 'feminine skills' in various work contexts might therefore not evidently lead to a revaluation of women workers. We can conclude that seeing gender as a social process allows researchers to use contemporary gender theories to better understand how gender with all its consequences is achieved in a specific situation.



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## PART III

### Sociology of equality, diversity and inclusion



# 11. ‘Gender competence’: gender mainstreaming, managing diversity and the professionalisation of gender politics in Germany

**Michael Meuser**

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## INTRODUCTION

The subject of this chapter is a process of professionalisation that is, at least in Germany, at the very beginning. The outlines of this process are quite unclear at the moment, and it is by no means certain that a new profession will ultimately be established. In some European countries gender politics is already more professionalised than it is in Germany, especially in Scandinavia. But in most European countries gender politics is not yet (fully) professionalised. Because of the emerging and developing character of the process it is not possible to rely on current research results. Rather I shall present a rough sketch of a process that is of sociological interest in different aspects. Not only gender studies, but also the sociology of profession, of knowledge and of organisation provide important conceptual frameworks for analysing this process. I shall focus on aspects that are relevant for gender studies and for the sociology of profession.

## A NEW SHAPE OF GENDER POLITICS

Since the early 21st century there has been a change in gender politics that might end in a structural change. This change is evoked by the new approach of gender mainstreaming which was established on an EU level in 1997 by the Treaty of Amsterdam. The implementation of gender mainstreaming (and of managing diversity, a politics that is becoming increasingly important in private enterprise) has resulted in a growing demand for a new type of knowledge and competence: ‘gender knowledge’ and ‘gender competence’. This is accompanied by a process of professionalisation which includes different groups of actors (ranging from the women’s movement



to management consultants) competing to define gender competence and to ascertain who can claim successfully to be gender competent.

Gender politics has existed as an institutionalised field of politics since the end of the 1970s: in the form of anti-discrimination and equal opportunities policies in favour of women. In Germany (and in many other European countries), the institutionalised actors are women's representatives in public administrations and in private enterprise. In recent years the name has changed to 'representatives for gender equality' (Gleichstellungsbeauftragte). Very often the work of the women's or gender representative is additional to the incumbent's 'normal' work. Until the recent past, the core criterion in recruiting personnel for these positions was the candidate's engagement in women's politics. There was no special and codified knowledge, authenticated by a certificate. Access to the position of the women's representative had not been formalised. Even if there were women's representatives on a full-time basis, the work that they did was not seen as a profession. The women's representative was more a function than an occupation or a profession. The professionalisation of gender politics had not taken place within this context, at least in Germany.

This estimation is based on the definition of 'profession' in the sociology of profession. According to the 'classical' definitions of Goode (1957, 1969) and Parsons (1968; see also Macdonald 1995), professional work is characterised by the following features:

- its frame of reference is the current state of a specific scientific knowledge;
- professions strive for independence founded in the authority of science;
- members of a profession usually have an academic degree;
- new members are recruited by established professionals according to the principle of co-optation;
- the quality of professional work is assessed by colleagues, that is, by the profession itself, not by the state. Professional associations, ethical principles of professional work and ethics committees are the central means of professional self-control; and
- professional work is guided by collectivity orientation, not by self-orientation.

## GENDER MAINSTREAMING

During the last few years the professionalisation of gender politics has begun. It has taken place in the new fields of gender mainstreaming and

managing diversity. Gender mainstreaming is a concept that is open to different interpretations. According to the widely quoted definition of the Council of Europe, gender mainstreaming is 'the (re)organisation, improvement, development and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies at all levels and at all stages, by the actors normally involved in policy-making' (Council of Europe 1998: 15). According to this definition, gender mainstreaming is understood as a cross-sectional task. It has (i) a personnel dimension – all members of an organisation are involved, (ii) a thematic dimension – all programmes and decisions have to be checked with respect to gender equality, and (iii) a formal dimension – all levels of an organisation's hierarchy are involved.

The complexity of the area of responsibility and the inclusion of potentially all members of an organisation account for why gender politics tends to become professionalised under the auspices of gender mainstreaming. There is a growing demand for gender competence on the side of the organisations, so that it is economically worthwhile to develop and to offer a specific gender expertise. The responsible actors within the organisations – and these are not only the women's representatives – are usually not equipped with the knowledge that is necessary to start gender mainstreaming processes effectively. This circumstance and the political pressure to implement gender mainstreaming have led to a growing demand for gender expertise (Bock et al. 2004: 248; Schambach and von Barga 2004: 283).

## GENDER EXPERTISE

Gender mainstreaming and managing diversity have created a new market, and those who offer their services on this market try to professionalise their expertise. A new professional profile is emerging: the gender expert. The shape and the course of this process are well known from research in other fields of professionalised work, where we can observe the first steps of an academic approach to knowledge transfer as well as initiatives to found a professional association. In 2004, a professional association for gender training and gender counselling was founded in Germany. Established professional associations of education and counselling are aiming to integrate the gender issue into their professional activities, for example the German Association for Supervision or the German Association of Adult Education. The Professional Association of German Sociologists has also taken up the gender issue.<sup>1</sup>

Various institutions are involved in the academic approach to knowledge transfer. The most prominent German institution is the Gender

Competence Center at Berlin's Humboldt University. The Free University of Berlin has also established a course in gender competence. The Center of Social Research in Dortmund has founded a Gender Academy. The University of Applied Sciences in Kiel offers 'custom-made programmes of qualifying and training for the implementation of gender mainstreaming';<sup>2</sup> on completing the course, the students receive a 'Gender Expert' certificate.<sup>3</sup> There are similar academic approaches in other countries. The Tyrolian University of Applied Sciences in Kufstein, for example, offers 'gender competence training'. The University of Applied Sciences in Solothurn, Switzerland, offers a gender management course. Not only academic institutions, but also other organisations are trying not only to meet the demand for gender knowledge, but also to stimulate it: political foundations and, interestingly, various consulting firms. The kind of gender knowledge that is taught varies from institution to institution. I shall return to this point. With regard to the relationship between gender and profession, there is a further issue that reminds us of processes of professionalisation in other fields. With the growing professionalisation of gender politics, the field becomes attractive to men. This is similar to the professionalisation of social work, for example.<sup>4</sup> Professionalisation changes the gender relation in favour of men even in the field of gender politics, which until now has been occupied almost exclusively by women.

## GENDER COMPETENCE

The new leading concept in gender politics is 'gender competence'. The term itself is generally accepted. But what gender competence means, what it consists of, is an issue that is widely contested. Within this struggle, the women's movement and female politicians engaged in women's politics are only two stakeholders among several competing groups of actors. The definitions of gender competence oscillate between two poles: political and economic. At one extreme, gender competence is defined in the tradition of political feminism, that is, finding ways and means for eliminating the persisting inequalities between women and men. At the other, it is characterised by a dominance of economic arguments and reasons; the differences between women and men are not so much described in terms of social inequality, as understood as a resource of organisational development.

To outline the political definition I refer to the paper by Sigrid Metz-Göckel and Christine Roloff (2002: 8), 'Gender competence as a key qualification'. Based on a definition of gender as a structural category in social analysis, gender competence is understood as the 'knowledge necessary to recognise social determinations in the behaviour and the attitudes

of women and men and as the ability to deal with these determinations in a way that new options will be opened to both genders'. According to Metz-Göckel and Roloff, a core element of gender competence is knowledge about the social constitution of gender relations and the hierarchies within these relations.

This critical perspective on power and supremacy is more or less absent in the economic definition of gender competence. According to this definition, the target is not so much to eliminate social inequality as to optimise the workflow in organisations. This is revealed paradigmatically by a consulting firm's explanation of why it is reasonable to engage in gender issues. This firm offers an extended vocational training that leads to the 'Gender-Change Manager' certificate.<sup>5</sup> The reasons given are:

- Equality between women and men makes it possible for an organisation to make optimal use of all human resources.
- Female customers and decision makers become more and more important.
- Men are increasingly interested in work–life balance.
- Equal opportunities between women and men improve the organisational culture and the efficiency of the employees' cooperation.
- A gender-orientated human resources and organisational development becomes increasingly important as an issue of competition with other enterprises in order to commit qualified employees long term to the organisation.

An economically focused interpretation of gender competence and gender management is not limited to the private sector of consulting firms. It is also present in public administration, in universities and in state politics. The former German Women's Minister, Renate Schmidt, places particular emphasis on the entrepreneurial approach of gender mainstreaming:

According to the entrepreneurial approach, to make use of individual competences as intensively as possible, it is beyond all question to discriminate against one gender, for this would thwart the objective of utilising human resources as effectively as possible. There were wasted opportunities, and this would be on the organisation's account.<sup>6</sup>

The state government of Schleswig-Holstein, one of the German federal states, sees gender mainstreaming as a 'modern control mechanism of quality improvement'.<sup>7</sup> The University of Applied Sciences in Kiel states that 'deficiencies of equal opportunities impede the modernisation of public administration' and hamper 'the appropriate application of human resources potentials within organisations'. This would all lead to 'a

reduction in quality, a waste of resources, dissatisfaction, and disadvantages in competition' (Liebig, 2004).

Empirical research should be undertaken to establish which understanding of gender competence will prevail in the course of the professionalisation of gender politics. Most of the institutions and organisations which participate in this process subscribe to an interpretation of gender competence that integrates aspects of both definitions: the political and the economic. On the occasion of establishing a course of studies in gender competence at the University of Applied Sciences in Solothurn, Switzerland, Brigitte Liebig (2004), for example, describes gender competence as a 'double strategy'. 'Gender competent action' would be orientated 'equally to the realisation of equal opportunities in society and to a productive dealing with gender differences in the daily routine of organisations'. It is my prognosis that the economic definition of gender competence will increasingly supersede the political one.

None the less, it is obvious by now that, on the level of semantics, the language of modern management has become predominant even among those who subscribe to the political approach of gender mainstreaming. Gabriele Schambach and Henning von Barga from the Heinrich-Böll Foundation – the political foundation of the German Green Party – demand that the objectives of gender mainstreaming should be presented in a 'SMART' language: 'Specific', 'Measurable', 'Ambitious', 'Realistic', and 'Time phased' (Schambach and von Barga 2004: 289). According to an EU project on gender equality, the acquisition of gender competence should take place 'ingeniously' (*genial* in German): *GENderkompetenz Im Assessment Lernen* (learning gender competence in assessment).<sup>8</sup> Semantic aspects are by no means secondary. The semantic changes refer to a changed relevance in politics.

## GENDER AND ORGANISATIONAL DEVELOPMENT

To steer gender mainstreaming processes in this 'smart' or 'ingenious' way, an adequate expert knowledge is necessary. Furthermore, among those who understand gender mainstreaming as a political task, this knowledge is not only related to the structures and relations of social inequality between women and men, but it also entails knowledge concerning competence in management, especially in human resources management, and in consulting. In most cases, gender competence means the combination of this gender-unspecific knowledge with a specific knowledge of gender relations, and the efforts to professionalise gender politics are targeted at this combination of knowledge. Thus, gender competence becomes

part of leadership skills in organisations. Within the curricula of gender competence courses and the advertising slogans of those institutions and firms which offer gender competence, this is added as a fourth criterion of professional competence to the well-established criteria of technical, methodical and social competence. According to its protagonists, gender competence is as important for successful quality management as are the other competences.

The implementation of gender mainstreaming and managing diversity would have far-reaching consequences for organisations since the organisation's self-observation would change. Gender would become a routine criterion (Meuser 2004). This raises interesting questions for the sociology of organisations that cannot be dealt with here in detail. Following Max Weber and Niklas Luhmann, the mainstream of organisational theory sees organisations as gender-indifferent or gender-neutral formations (Ohlendieck 2003). If gender competence were to become a regular part of professional competence, the empirical reality that organisational theory is related to would change.

How far gender competence is already implemented in organisations awaits empirical research. The establishment of a gender market where not only public institutions of education and vocational training but also private consulting firms offer courses and services lead us to expect that gender will increasingly become a core parameter in organisational development.<sup>9</sup> One thing is obvious: due to the economisation that accompanies the professionalisation of gender politics, the category gender itself is subject to a recoding. The notion of gender has tended to change: from a critical category in the analysis of social inequality to a resource of organisational development (Bereswill 2004). It is to be expected that with this change social conflicts will tend to disappear from the gender agenda. The economic perspective on gender as a human resource sees the gendered division of labour, so to speak, as the 'natural order'; due to the division of labour, men and women have different competences, and these differences should be utilised in favour of organisational development. Not utilising the differences would lead to 'opportunity costs'. The division of labour between women and men is seen as a resource that human resource management should rely on positively, whereas previously gender politics tried to reduce the division of labour.

Looking at the recent discourse in business studies we can observe a narrowed understanding of gender in a further sense. When speaking of gender as a human resource, this discourse implicitly focuses on women, not on women and men. Gender is perceived as a human resource of women only. While aiming at strengthening the position of women in the labour force, an equation is reproduced that is well known from the

history of the cultural construction of gender in modern Western thinking: to see only women as gendered beings.

The search for underutilised potentials is not restricted to gender. According to the managing diversity approach that is related to gender mainstreaming, other relations of social inequality are set on the agenda of organisational development: class relations, ethnicity, age groups, sexual orientations. But different from the ‘gender–class–race debate’ in social sciences and gender studies that focuses on multiple relations of social inequality, managing diversity is very often understood in a way that multiple competences are looked for and exhausted for organisational development. The focus changes from – negatively connoted – social inequality to – positively connoted – cultural differences.

## CONCLUSION

The professionalisation of gender politics takes place within this context of stressing the importance of differences. Here, ‘professionalism’ means managing differences in favour of organisational development. To do this effectively, a specialised expertise is required. Whereas formerly gender competence was authenticated by a strong commitment to and an active involvement in women’s politics, it tends now to be authenticated by a certificate or a diploma. The women’s representative tends to be replaced by the ‘gender-change manager’ who is competent to do a ‘gender budget analysis’ and a ‘gender impact assessment’. Once again the changes in semantics refer to a changed relevance. Under the auspices of professionalisation of gender politics, competences other than political ones are increasingly required. It is my thesis that the more gender politics is professionalised, the more it will be de-politicised. The women’s movement loses its power of definition concerning gender issues in favour of the new gender experts. From the perspective of the sociology of profession this is not surprising. It is part of the dynamics of professionalisation or, so to speak, the usual price that has to be paid when the issues of a political movement are transformed into the dynamics of ‘successful’ professionalisation.

## NOTES

1. Gender mainstreaming was the subject of one issue of the association’s journal in 2004: *Sozialwissenschaften und Berufspraxis*, 27 (3).
2. See [www.frauenforschung.fh-kiel.de/GenderKompetenz/GenderKompetenz.htm](http://www.frauenforschung.fh-kiel.de/GenderKompetenz/GenderKompetenz.htm) (retrieved: 1 October 2004).
3. See [www.weiterbildung.fh-kiel.de/3\\_01.php](http://www.weiterbildung.fh-kiel.de/3_01.php) (retrieved: 15 October 2004).

4. In Germany, social work was formerly an almost exclusively female occupation. In the first half of the 20th century, vocational training took place in the so-called '*Soziale Frauenschule*' (social women's school), a non-academic institution. After the Second World War vocational training was reorganised, and since the end of the 1960s, social work has become an academic discipline. Since then the proportion of male students has increased by up to one-third (Pfaffenberger 2001).
5. See [www.isa-consult.de](http://www.isa-consult.de) (retrieved 23 April 2004).
6. See [www.bmfsfj.de/Kategorien/reden/reden.did=12064.html](http://www.bmfsfj.de/Kategorien/reden/reden.did=12064.html) (retrieved 27 April 2004).
7. See [landesregierung.schleswig-holstein.de/coremedia/generator/Archivordner/MJF/Dokumente\\_20MJF/Rede/Gender\\_20II.html](http://landesregierung.schleswig-holstein.de/coremedia/generator/Archivordner/MJF/Dokumente_20MJF/Rede/Gender_20II.html) (retrieved 1 October 2004).
8. See [www.life-online.de/deutsch/projekte/genial.html](http://www.life-online.de/deutsch/projekte/genial.html) (retrieved 1 October 2004).
9. Note that the present state of gender politics enables the sociology of profession to observe the development of a new occupation and its professionalisation from *status nascendi* on, instead of reconstructing it in retrospect.

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## 12. Queering the principles: a queer/ intersectional reading of Frederick W. Taylor's *The Principles of Scientific Management*\*

**Alexander Fleischmann**

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### INTRODUCTION

Discrimination of various groups such as women, immigrants and older people continues . . . Additionally, various kinds of programmes aimed at removing inequality, such as gender equality or managing diversity programmes, may actually promote it by making differences visible and stabilizing them. Management, under such circumstances, comes to refer to the management of appearances which substitutes for (other) more radical acts. (Czarniawska and Höpfl, 2002, p. 1)

What could these 'other' more radical acts look like? How is discrimination embedded in the principles of management? How is this reflected in constructions of manager identities? The aim of the present text is to approach these questions by deconstructing a highly influential text in management, Frederick W. Taylor's *The Principles of Scientific Management*, from a queer and intersectional perspective. This approach stands in line with others that treat management theory as texts to be analysed. For example O'Connor (1996) analysed Taylor's authority as 'self-authorized' and his legitimising of management 'by associating it with science', and Monin et al. (2003) identified moralistic elements echoing Christian morality implied in Taylor's 'rationality'. But until now, a deconstruction of Taylor's work from a queer or intersectional perspective is missing.

Within organisation studies, discriminations on the basis of gender have been studied by various scholars during the last few years (for overviews, see, for example, Hearn and Parkin, 1983; Alvesson and Billing, 1997; Calás and Smircich, 1999, 2006; Gherardi, 2003). Also the role of organisation theory in reproducing gender inequalities has been examined (Acker, 1992; Bendl, 2005). But, as Acker (1998, p. 196) notes, we have to conceptualise organisations as 'sites in which we find class, and often race, as well

as gender'. In both organisation studies as well as organisational practices, diversity (management) highlights that there are various differences other than gender (for example, Gardenswartz and Rowe, 1994; Kandola and Fullerton, 1998; Konrad et al., 2006). However, programmes for gender equality, anti-racism and diversity management have been accused of reproducing the differences they try to overcome (for example, Lorbiecki and Jack, 2000; Czarniawska and Höpfl, 2002; Litvin, 2002). Martin (1990) has already proposed a more substantial way to approach these issues by *deconstructing* gender conflicts in organisations. In her conclusions she notes, however, that she ignored class relations, ethnicity, (dis)ability and sexual orientation in her work. Those gaps form the starting-point of my work in which I use queer theory and intersectionality as a theoretical framework to further the understanding of discriminatory management discourses. Therefore, I shall now introduce important aspects of queer theory and intersectionality, followed by an exploration of deconstruction. After my analysis of Taylor's text I shall present final conclusions.

## QUEER THEORY AND INTERSECTIONALITY

Both queer theory and intersectionality have been highly influenced by post-structuralist thought. Major contributions to queer theory have come from Sedgwick (1990) or Butler (1993, 1999). In particular, Butler's notion of the 'heterosexual matrix' has been influential. Butler uses it to highlight that a stable identity with fixed sex and gender, positioned in a heterosexual hierarchical dual opposition of male and female, is a founding principle of Western thinking. It is reproduced in everyday interactions through 'performativity' (Butler, 1999). Sexuality can, accordingly, be conceptualised as a set of social rules and possibilities that regulate not only sexual but also social practices (Boudry et al., 1999). Landström (2007) highlights that queer theory makes it possible to question if 'femininity and masculinity are mutually exclusive' (p. 10) and to see gender as a 'heterosexual coupling of opposites' (p. 12). Instead of seeing gender as divided into two distinguishable notions of femininity and masculinity, queer theory focuses on the construction of the very border between the two and the connected construction of fixed and stable identities. Summing up and drawing on my earlier work (Fleischmann, 2005), queer theory challenges fixed and essentialist notions of identity that are discursively (re)produced in binary terms, highlighting the positioning of sex, gender and desire in a hierarchical matrix and the privileging of heterosexuality connected to it. There also exist first steps that reflect queer theory in organisation studies (Parker, 2002; Bendl et al., 2007a, 2007b).

While queer theory highlights the importance of (hetero)sexuality, important criticisms of identity conceptualisations within feminist theory have also come from feminists of colour, who claimed that ethnicity was not taken into account (for example, hooks, 1984). At the same time, post-structuralist criticism questioned the very basis of categorisation – what emerged from this criticism is now labelled ‘intersectionality’ (McCall, 2005). Intersectionality is now widely discussed in different areas of the social sciences and humanities (see, for example, Knapp, 2005; McCall, 2005; Søndergaard, 2005; Verloo, 2006; Yuval-Davis, 2006) and also in organisation studies (Acker, 2000; Eriksson-Zetterquist and Styhre, 2007). Intersectionality can generally be defined as follows:

[It signifies] the complex, irreducible, varied, and variable effects which ensue when multiple axes of differentiation – economic, political, cultural, psychic, subjective and experiential – intersect in historically specific contexts. The concept emphasizes that different dimensions of social life cannot be separated out into discrete and pure strands. (Brah and Phoenix, 2004, p. 76)

Using this definition and combining it with queer theory, my intention is to deconstruct the categories themselves.

## DECONSTRUCTION

For Martin, deconstructing means looking at what a ‘story . . . says, what it does not say, and what it might have said’ (Martin, 1990, p. 339). Central to deconstruction, a notion coined in its post-structuralist understanding by Jacques Derrida, is seeing the censoring effects of ‘centring’ moves in language (Cooper, 1989). This centring occurs in binary oppositions in ‘a violent hierarchy’ as ‘[o]ne of the two terms governs the other’ (Derrida, 1981, p. 41). Hence, the first step in a deconstruction is the identification and the overturning of dichotomies.

I shall therefore conduct a queer/intersectional close reading of *The Principles of Scientific Management* (Taylor, 1911 [1998]), searching for ‘subject positions’, which I define as parts of the text where an individual or groups of individuals are discursively constructed (for example, worker(s), manager(s), scientist(s) and so on). I then explore how these subject positions are constructed in dichotomous terms. But for a successful deconstruction a second step is needed, as ‘the hierarchy of dual oppositions always reestablishes itself’ (Derrida, 1981, p. 42). This second step is called ‘metaphorisation’ and it implies that the process never ‘degrades’ into a structure in order to emphasise the ongoing *process* of dividing (Cooper, 1989, p. 488).

I consider deconstruction to be a highly subjective method and agree with Martin that '[d]econstruction cannot and does not claim to reveal the truth about what the author of a text intended to communicate' (Martin, 1990, p. 342). Thus, someone else deconstructing the same text, even with the same theoretical framework, would probably come to different conclusions. Last but not least, although my intersectional approach would call for overcoming the traditional categories of social divisions (gender, class, race/ethnicity, sexuality and so on), in order to keep the text comprehensible, I shall still use those categories to group my findings and try to connect them to other categories as often as possible.

### **Class**

For Acker (2000, p. 200) class inequality and exploitation in general have more legitimacy than, for example, gender- or race-based discrimination. Also, Taylor's text uses a class distinction. Right in the beginning Taylor makes clear that although he has worked as a foreman, he has advantages that enable him to do scientific research:

The writer had two advantages, however, which are not possessed by the ordinary foreman, and these came, curiously enough, from the fact that he was not the son of a working man. (Taylor, 1911 [1998], p. 23)

So the distinction between workers and managers/scientists on the basis of class forms an important basis for scientific management. Connected to that are stereotypes on intelligence, as the next excerpt shows:

This work [pig-iron handling] is so crude and elementary in its nature that the writer firmly believes that it would be possible to train an intelligent gorilla so as to become a more efficient pig-iron handler than any man can be. (Ibid., p. 18)

Inscribed in this quotation is a hierarchy based on class and, connected to it, on the position in the organisation. The hierarchy is clearly established, as in contrast to those gorillas the text speaks of 'one type of man' (ibid., p. 16) who stands at the other end: the manager. Indeed, Monin et al. (2003, p. 391) also argue that Taylor's text signifies 'the Victorian hierarchy of class and birthright'.

### **Ethnicity**

Nkomo (1992) has already claimed that race has been largely excluded from organisation studies. However, there is now some work, mainly from a post-colonial perspective (for example, Cooke, 2003; Prasad, 2003).

Interestingly enough, aspects of race or ethnicity are never *explicitly* an issue in Taylor's text, except once:

He was a little Pennsylvania Dutchman who had been observed to trot back home for a mile or so after his work in the evening, about as fresh as he was when he came trotting down to work in the morning. . . . This man we will call Schmidt. (Taylor, 1911 [1998], p. 20)

The last sentence in particular is a perfect example of the discursive production of otherness. Who is this 'we' who calls 'this man' Schmidt? Is it the managers who have the right to label their 'little' employees? Is it the scientists by virtue of their scientific knowledge? Taylor's representation of Schmidt can accordingly be read as 'childlike' (Jacques, 1996, p. 81) or as adopting an 'infantilizing slavers' voice' (Cooke, 2003, p. 1912).

## **Gender**

Taylor's text shows a binary understanding of gender, where men are positioned in a hierarchy above women, as the following quotations will show. The text refers in almost its entirety to 'men', women are mentioned in only two parts of the text. First as consumers and hence outside paid work life:

now almost every man, woman, and child in the working-classes buys one or two pairs of shoes per year. (Taylor, 1911 [1998], p. 5)

Interestingly, this quotation implies not only a division between men and women, but also a division between adults and children (referring to age) as well as a division between working and non-working class. This quotation highlights the usefulness of an intersectional approach, as the 'complex, irreducible, varied, and variable effects' (Brah and Phoenix, 2004, p. 76) in the creation of subject positions become visible. The second time women are mentioned, they are part of the workforce but referred to as 'girls'.

There are instances, however, in which the 'scientific selection of the workman' counts for more than anything else.

A case of this type is well illustrated in the very simple though unusual work of inspecting bicycle balls. . . . the one hundred and twenty or more girls who were inspecting the balls were 'old hands' and skilled at their jobs. (Taylor, 1911 [1998], p. 43)

The illustrations [of girls inspecting bicycle balls] have thus far been purposely confined to the more elementary types of work, so that a very strong doubt must still remain as to whether this kind of cooperation is desirable in the case of more intelligent mechanics, that is, in the case of men who are more capable

of generalization, and who would therefore be more likely, of their own volition, to choose the more scientific and better methods. (Ibid., p. 49)

In analysing the above quotations, the discursive production of differences in intelligence, based on a dichotomous and hierarchical understanding of sex/gender becomes visible. It privileges men and denies women intellectual capabilities. Furthermore, in those quotations, different axes of social division are used. On the one hand, the term ‘girls’ refers to age differences, but also, as I would argue, to sexuality. Especially for ‘the one hundred and twenty or more girls who were inspecting the balls [and who] were “old hands” and skilled at their jobs’, a sexual connotation seems obvious. Aspects of implicit sexuality will be elaborated in the next subsection.

### **Sexuality**

Sexuality remains pervasive in organisations through the power of men (over sexuality and women), the power of the public sphere (over sexuality and reproduction) and the power of reproduction (over sexuality) (Hancock and Tyler, 2001, p. 159). Therefore, sexuality has been (although not in the mainstream) discussed by organisation studies scholars (for example, Burrell, 1984; Hearn et al., 1989; Calás and Smircich, 1991; Brewis and Grey, 1994; Hearn and Parkin, 1995; Brewis and Linstead, 2000; Brewis, 2001; Ward and Winstanley, 2003). For Foucault (1978) the connection between the suppression of sexuality (or actually what has been read as suppression) and the capitalistic economy is crucial. Highlighting its productive power, the discursive construction of the notion ‘sexuality’ is aimed at positioning sex outside organisations, not repressing it but pigeonholing it in the reproductive sphere of heterosexuality. This forms a key to understanding both modern sexuality *and* organisations – the concepts of sexuality and organisation suffuse each other.

Sexuality in Taylor’s text is clearly visible in the first of his three empirical examples. About pig-iron handlers, Taylor writes:

Now the one man in eight who was able to do this work was in no sense superior to the other men who were working on the gang. He merely happened to be a man of the type of the ox, – no rare specimen of humanity, difficult to find and therefore highly prized. (Taylor, 1911 [1998], pp. 29–30)

According to the definition provided in the *Collins English Dictionary and Thesaurus* (1993), the term ‘ox’ is defined as ‘1. an adult castrated male of any domesticated species of cattle used for draught work and meat’. The conclusion might therefore be that ideal pig-iron handlers are castrated and domesticated.

Taylor's second case study is that of female bicycle-ball inspectors, whom he refers to throughout the text as 'girls', at one point even comparing them to children:

The average workman must be able to measure what he has accomplished and clearly see his reward at the end of each day if he is to do his best. And more elementary characters, such as the young girls inspecting bicycle balls, or *children*, for instance, should have proper encouragement either in the shape of personal attention from those over them or an actual reward in sight as often as once an hour. (Taylor, 1911 [1998], p. 48, emphasis in original)

In contrast to oxen and girls, it is interesting to see how Taylor characterises managers:

Under scientific management, on the other hand, it becomes the duty and also the *pleasure* of those who are engaged in the management not only to develop laws to replace rule of thumb, but also to teach impartially all of the workmen who are under them the quickest ways of working. (Ibid., p. 53, added emphasis)

Work of this character is intensely interesting to any one who has any *love* for scientific research. (Ibid., p. 54, added emphasis)

Pleasure and love are the domain of managers and scientists, oxen and girls are denied their sexuality. By comparing women to children, the latter being in general wrongly considered as having no sexuality, women are deprived of their sexuality, too. Hence, the text depicts girls and oxen as presenting no danger at all for the (sexually able) managers and scientists. The power differential inscribed in this dichotomy is obvious. Managers and scientists as subjects possess sexuality. Girls and oxen, however, are *tamed* and *domesticated* – not only by hierarchical order but also through a discursive dichotomy that fixes their object positions within an organisation. This metaphor of sketching workers as oxen/girls deprives them of sexuality and can also be read as a metaphor for depriving them of agency within the organisation.

### **The Essence of Management**

Having looked at different categories of social division, I shall now draw attention to what Taylor calls the 'essence' of his work:

These<sup>1</sup> are, however, merely the elements or details of the mechanism of management. Scientific management, in its essence, consists of a certain philosophy, which results . . . in a combination of the four great underlying principles of



management . . . *First*. The development of a true science. *Second*. The scientific selection of the workman. *Third*. His scientific education and development. *Fourth*. Intimate friendly cooperation between the management and the men. (Ibid., pp. 67–8, emphasis in original)

Indeed, at the heart of the philosophy of scientific management lie the *selection, education and development of the worker*. Thus, as I would argue, the dichotomy of subject/object position within organisations is deeply rooted in the concept of scientific management. As in Taylor's own words, labourers are moved 'very much as chessmen are moved on a chessboard' (ibid., p. 34). But who moves those chessmen?

## CONCLUSION

Concluding from the above, the *subject* in charge of moving the chessmen, of selecting, educating and training the worker, the *object*, is 'one type of man', namely the manager. Within the text oxen, girls, children, gorillas, a Pennsylvanian Dutchman and so on are visible so that the manager's identity as different from these various 'others' can be constructed, to show what a manager is *not*. What remains is that a manager is a *white, English, educated, sexually active, non-working-class male*. But these classifications remain unmarked as the subjects are simply labelled 'manager', 'engineer' or 'scientist'.

Applying Parker's (2002) view of seeing managing as 'a doing, or a becoming' (p. 159), doing management, becoming a manager means being unmarked in contrast to various marked 'others'. Similarly, Cooke (2003) argues in the case of race (referring to the management of ante-bellum plantations) that 'white supremacist racism underpinned the creation of the managerial identity' (p. 1911) and that racism and resistance to it form a 'continuing and defining strand' (p. 1915) in organisations and organisation studies.

My work provides the first step towards a deconstruction and shows how the construction of subject positions in hierarchical dichotomies are persistent in Taylor's text. The above deconstruction based on the queer/intersectional framework has shown how discriminatory dichotomies are inscribed into *The Principles of Scientific Management* and the construction of the manager identity. I therefore argue that the discussed power differentials based on gender, ethnicity, class and sexuality equally form 'continuing and defining strands' of management discourse.

Taking up my initial questions, what could more radical acts look

like? What about metaphorisation? For Engel (2002, p. 69) the queer political scope cannot merely be the call for a pluralistic multiplication of subject positions, since power differentials will remain. For that reason she demands allowing for 'bodySubjectivities' that do not fit into the dichotomous matrix of either/or. Indeed, queering the principles, queering organisation studies and management discourse would mean constantly disrupting theories, like Taylor's, that construct individuals as having fixed identities that entail exclusion of 'others' in binary terms. Hence, queering, overturning and metaphorising highlights the fluidity of identity and the mechanisms of establishing borders and exclusions in order to overcome the hierarchical dichotomies of either/or.

## NOTES

- \* I presented an earlier draft of this chapter called 'Queer(ing) organization theory – intersectionality revisited' at the Gendered Organization Theory track of the 2007 Gender, Work and Organization Conference, Keele University, Staffordshire, UK. I would like to thank Regine Bendl and Michele Gregory for their support as well as all track participants for their helpful comments.
1. Immediately before this paragraph, Taylor lists the following: time study, functional or divided foremanship, standardisation of all tools, desirability of a planning room or department, 'exception principle', slide-rules, instruction cards, task idea, bonus for successful performance, 'differential rate', mnemonic systems, routing systems, modern cost system and so on.

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## 13. Critical sensemaking and workplace inequities

**Jean Helms Mills and Albert J. Mills**

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### FROM ORGANIZATIONAL RULES TO CRITICAL SENSEMAKING

Our approach to the study of workplace inequities has developed over time from a focus on organizational rules (Mills, 1988a, 1988b, 2004; Mills and Murgatroyd, 1991), through sensemaking (Helms Mills, 2003, 2004b), to what we have come to call ‘critical sensemaking’ (Helms Mills and Mills, 2000; O’Connell and Mills, 2003; Helms Mills, 2004b; Mills and Helms Mills, 2004, 2006a; Helms Mills et al., 2006; Helms Mills and Weatherbee, 2006; Mullen et al., 2006). In our recent work we have used critical sensemaking to understand how the interaction of structural and social psychological processes contribute to gender identity at work (Thomas et al., 2004). To explain critical sensemaking we need to look at the two central elements – organizational rules and sensemaking.

#### **Organizational Rules**

By organizational rules we mean, ‘in the broadest sense, outline steps for the conduct of action’ that, depending on circumstances, are experienced as controlling, guiding, and/or defining (Mills and Murgatroyd, 1991: 30). Such rules are written and unwritten, formal and informal. They can also be normative, moralistic, and/or legalistic. On their own, individual rules can contribute to gendered expectations and identities where they suggest or impose discriminatory expectations on one sex as opposed to another. For example, the 1924 official ruling of the International Commission for Air Navigation (ICAN) that women be excluded from the flight crews of commercial aviation not only stopped the hiring of female pilots but contributed to gendered notions of piloting (Mills, 1998). However, individual rules – whether formal (for example, job descriptions) or informal (for example, dress codes) – may not, arguably,

be influential enough to inhibit some people from rejecting or resisting any potential gendered associations with certain behaviors (for example, caregiving). A good example is the development of the role of the flight attendant. Originally a male occupation, the associated 'care' and 'service' expectations do not appear to have encouraged a view of the male steward as effeminate. Indeed, the job characteristics were easily transferable to female flight attendants once barriers to their hiring ended (see *ibid.*). A more likely scenario is that configurations of rules – experienced as the culture of an organization – serve to reduce the space for resistance to gendered notions, that is, the sense of what it is to be a man or a woman in a particular organization may be limited by the extent to which discriminatory rules dominate a culture's rule configuration (Mills, 1988a).

Through a focus on organizational culture as a configuration of rules we have set out to examine how rule changes contribute to discriminatory practices over time (Mills, 1996; Mills and Ryan, 2001; Helms Mills, 2004a; Mills and Helms Mills, 2006b). This research – focused on in-depth case studies of British Airways, Air Canada and Pan American Airways – has allowed us to examine how gendered rules develop, are maintained, and change over time. Thus providing insights that will help us to identify potential discriminatory rule sets before they get established and how to address existing gendered rule sets. What we have learned is that (a) configurations of rules serve as a gender gestalt within which men/women, male/female, masculine/feminine are socially constructed – change the configuration and you will begin to change the gestalt and associated identities; (b) mundane rules – embedded within the processes and practices of an organization, both formally and informally – are the glue that hold together discriminatory behaviors; confronting those rules will help the actors involved to assess their own contributory behaviors; and (c) organizational leadership is an important element of cultural change but that leadership has primarily to be detached from established cultural behaviors and expectations in order to address not only the formal but also the informal rule configurations.

Although the concept of organizational rules is built around interplay between structural and phenomenological factors (that is, rules are developed and maintained through the actions of people but also serve to structure how people think about rules) we continued to face the question of how do 'individuals and groups translate and express rules as an active process' (Mills, 2004: 145). To resolve the problem we initially turned to Foucault's (1979) notion of discourse before exploring the social psychological properties that constitute Weick's (1995, 2001) organizational sensemaking framework.

## **Weickian Sensemaking**

Weick's (1995) sensemaking framework, arising from his earlier work on organizational disasters, was developed as an alternative way of analyzing organizations by challenging the notion of organizations as rational entities. Focusing on the processes of organizing, rather than on organizational outcomes, Weick suggested that the properties of sensemaking help us to understand the social–psychological processes that shape the outcomes.

According to Weick, the properties of sensemaking are interrelated and have varying degrees of importance at different points in time. Thus the statement, 'People make sense of things by seeing a world on which they have already imposed what they believe', reflects the properties of sensemaking that are: (i) grounded in identity construction; (ii) retrospective; (iii) ongoing; (iv) enactive of the environment; (v) social; (vi) based on the extraction of cues; and (vii) driven by plausibility, not accuracy.

Drawing on this approach Helms Mills was able to make sense of the introduction and implementation of a series of organizational change programs at a large electrical utility company that, in rapid succession, introduced a company-wide attitudes survey, a culture change, privatization, business process reengineering, and a Balanced Scorecard program (Helms Mills, 2003, 2006). While sensemaking was useful for understanding the social–psychological properties that influenced the decision making of senior managers, Helms Mills found that it did not adequately account for context (for example, established structural factors such as rules that influence sensemaking), power (for example, whose voice is being heard, what motives take precedence and why, and how does the unequal distribution of power within different contexts affect sensemaking?), and gender (for example, what is the impact of ongoing, social, and enactive sensemaking on gendered understandings at work; and how do different understandings of men/women, masculine/feminine, influence sensemaking?).

In the process of this work on organizational change we began to realize that sensemaking provided the potential for studying how individuals and groups develop, maintain and change discriminatory rule sets. Further, we could also see how the notion of organizational rules helps to ground sensemaking in contexts of power and gender. Together the sensemaking and rules approach would constitute the framework of a new, critical sensemaking, approach to the qualitative study of workplace inequities.

## **Towards Critical Sensemaking**

In brief, critical sensemaking (CSM) provides a holistic approach in helping understand how and why members of organizations act in



certain ways, at certain points in time. In particular, the addition of organizational rules accounts for the rules of behavior, which mediate organizational activity and explain pre-existing influences on sense-making and the motives for the sensemaking event (Helms Mills, 2003). While Weick's model offers an important social psychological dimensional of understanding organizational life, CSM digs deeper into the *embeddedness* of the social-psychological processes that contribute to organizational outcomes. We have found CSM to be a useful tool to examine a number of organizational phenomena, including several studies we have carried out, in a variety of organizations, on understanding the gendering of organizational cultures and the processes that contribute to discriminatory practices being adopted, enacted and maintained over time.

### **CSM as a methodology**

In 2000, we outlined the elements of critical sensemaking for the study of gendered practices that included not only a focus on organizational rules and sensemaking, but also Unger's (1987, 2004) notion of formative context (that is, 'the origins of social arrangements [that] lie in past social conflicts and the institutional and imaginative arrangements that followed their resolution' – cited in Blackler, 1992: 283), and Foucault's (1979) notion of discourse (that is, the empowering of certain ideas through their appearance as 'knowledge' that are produced/reproduced through action and language that translates that action). Formative context draws our attention to the institutional and imaginative arrangements in which people develop rules and make sense of them. For example, to understand how it was that women were virtually excluded from commercial aviation in the early to middle part of the 20 century we need to understand the impact of the First World War on the actors (that is, former military officers), structures (for example, the reproduction of air force ranks and hierarchy), and concept of masculinity (for example, flyers as warriors) in the post-war era (Mills, 2006). Discourse draws attention to ways in which expectations not only cohere into ways of thinking and behaving but also are experienced as 'knowledge'. As Walkerdine (1990) puts it, 'Femininity and masculinity are fictions linked to fantasies deeply embedded in the social world that can take on the status of fact when inscribed with the powerful practices . . . through which we are regulated' (quoted in Ussher, 1991: 15). Thus, we argue, configurations of rules need to be examined for their contribution to organizational discourse and associated knowledge. In many of the early commercial aviation companies, for example, a number of rules around safety can be seen to have cohered into a masculine discourse of safety which is rooted in notions of risk, danger,

heroism, and skills associated with wartime male flyers (Mills, 1998, 2006; Mills and Helms Mills, 2006b).

## THE SENSEMAKING IN CRITICAL SENSEMAKING

Despite the compelling nature of Foucauldian discourse analysis (Phillips and Hardy, 2002), we have retained a central focus on sensemaking to recover the sense of agency in gender studies. Despite Foucault's (1988) later work on technologies of the self we would argue that the problem of agency remains an important concern with his approach. A focus on the various social–psychological properties helps to reveal the processes behind identity construction and the ways that a sense of a situation is enacted, drawing on selected cues and a retrospective sense to create a new ongoing sense that comes to dominate an organization. For example, key decision makers, who enact organizational rules, are influenced by a number of different factors, including context. Using Weick's sense-making properties, we can see how (organizational) identity can constrain an individual's sensemaking (this is an ongoing and social process and one that forces the sensemaker to seek out familiar solutions that have worked in the past (retrospective) and maintain the social status quo, to find cues that fit with this identity and make the decision to act in a certain way plausible and legitimate). In the process, a sense of what constitutes a man or a woman may be reconstructed.

### **CSM in Practice**

In a 2002 study (Helms Mills, 2002), CSM was used to make sense of the gendering of the culture of Air Canada during its early years. Specifically, employment practices and the portrayal of women in corporate documents and media accounts were studied at different junctures in the airline's history. Sensemaking was used to understand how meaning was bestowed on organizational rules and how these were mediated by the formative contexts that were in place at those moments in time (*ibid.*). The objective of this research was to provide an understanding of the origins of gender discrimination at work and the possibility of disrupting them by enacting a new sense of organization.

In a similar study (Helms Mills, 2004a), the critical sensemaking approach was used to explore the processes that led to the formation of different types of masculinities over three junctures in the history of an electrical utility company. An analysis of annual reports and other corporate documents, examined through a CSM lens, allowed us to make

sense of how layers of rules provided a framework for the sensemaking of organizational members, while formative contexts, which link activity at the local level with dominant social assumptions, helped make sense of the reproduction of discriminatory social practices and the resistance to new ideas (such as pay equity and the promotion of women to male-dominated jobs). By focusing on the ongoing nature of sensemaking and the social–psychological properties that maintained it, we were able to offer an explanation for the continuation of a gendered order, over time.

Critical sensemaking is in its infancy and early studies of organizational change (Thurlow, 2006), and resistance (Mills and Helms Mills, 2004; Carroll et al., 2006) have indicated that identity construction and plausibility are central factors in resistance and change. In particular we have shown that the destabilization of plausibility offers a rich site for feminists seeking to develop resistance strategies (Mills and Helms Mills, 2004).

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# 14. Feminist psychosocial approaches to relationality, recognition and denial

**Shona Hunter**

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## INTRODUCTION

[George] There are times when I've had to reflect on those sort of categorisations [gender and ethnicity], in a way, um, yes, um I have to think about it, um, in my, working relationships, urm, in terms of ur, you know, maybe a female colleague, and I can't necessarily that clearly pin down, [whispering] its kind of, it is a theme, that, that runs through and surfaces, at times with different people. I mean, sometimes with some people it's much more acute, for some reason, than with other people. With other people I scarcely notice, that we're a different gender, but, with some people there are things that somehow, bring us back to the forefront, time and again.

[Shona] Can you think about an example?

[George] Yes, I can. Urm, but, but often it'll be, the reasons for that, will remain concealed, um, and I may at various points speculate as to WHAT IT IS, um, but, unless a person chooses to sort of SHARE what might be very intimate stuff, you know, I'll never actually know, what it is, that makes the gender thing, a live thing between us, you know? [long pause] Um, I can think of one, maybe two relationships like that, where I know it IS AN issue, but I can't quite often put my finger on what it is, because it's locked, like, I don't know, I can't really say, define what it is. Um, I know I'm very much BEING DEFINED, in my sort of maleness, you know? Ur, and I have quite a strong sense of that.

(George, 52, white, male, UK, social work manager)<sup>1</sup>

In the UK context and internationally there is increasing societal and government recognition as to the existence of a number of social inequalities structured around intersecting sets of social relations (DTI, 2002, 2004; Yuval-Davies, 2006; Moon, 2007). Such intersectional analysis has been developed and debated in feminist contexts for some time (see Hill Collins, 1990; Crenshaw, 1993). My own perspective on this is similar to Brah and Phoenix (2004: 76) who:

Regard the concept of 'intersectionality' as signifying the complex, irreducible, varied, and variable effects which ensue when multiple axes of differentiation

– economic, political, cultural, psychic, subjective and experiential – intersect in historically specific contexts. The concept emphasizes that different dimensions of social life cannot be separated out into discrete and pure strands.

This sort of approach unpacks the limiting normalisations constituted in and through complex, contradictory and conflicting articulations of gender, ‘race’, class, age, sexuality and physical ability. For example feminist-postcolonial scholars are beginning to explore how gender, ethnicity and sexuality intersect in specific ways to produce current imperialisms in the context of the events of September 11, 2001 in New York and subsequent second war in Iraq. Claudia Brunner’s controversial (2007a, 2007b) work on the social construction of the ‘[woman] suicide bomber’ traces how race/ethnicity, gender and sexuality *work together* to frame the acts of women suicide bombers as either ‘outcomes of patriarchal oppression, personal despair and exaggerated emotionality – or the women are over sexualised, vilified and turned into perverted monsters’ (Brunner, 2007b: 8). Whether viewed as ‘mythic brides or monsters’, discursive constructions of these acts avoid ‘uncomfortable questions of subjectivity, agency and aggression’ (Naaman, 2007: 946).

In an English context, scholars explore how these same geopolitical events impact on national and local contexts. Claire Alexander’s work (2004, 2007) interrogates the construction of ‘the Asian Gang’ as a contemporary emblem for social disorder and breakdown in ‘community cohesion’ (Home Office, 2001) which is then used to justify punitive forms of public and social policy intervention around young Asian men. She follows how popular and policy discourses of anachronistic, hyper-masculine Asian/Muslim<sup>2</sup> cultures serve to produce images of Asian/Muslim youth in crisis, caught between cosmopolitan forward-looking Englishness and backward-looking, anachronistic Asianness. From a different but complementary perspective, Gail Lewis (2005) also considers the intersections of gender, generation sexuality and ethnicity. Her focus is on the figure of ‘the immigrant woman’ constructed as symbolic of the limits to multiculturalism and cohesion through her assumed role as caretaker of the sorts of gendered and generational economies which restrict cohesion and produce cultural crisis.

My own work focuses on the ways in which these various intersecting discourses play out in particular organisational contexts. In particular, how gender and race are constituted through class, sexuality and generation to produce certain ways of being ‘a public sector professional’ in health, social care (Hunter, 2005a, 2005b) and educational contexts (Hunter, 2006). I trace the ways in which much broader geopolitical discourses play out in notions of ‘the new professionalism’ as this gets

pitted against 'the old professionalism'. Two key themes are conspicuous in their recurrence: First, changing gender relations constituted by and constituting moves from the 'old' to the 'new' professionalism provide the terrain on which new forms of racialisation get played out. Second, poor performance (including the occurrence of ongoing gender inequalities in service provision and working relations) becomes racialised in particular ways. In health and social care, for example, it becomes discursively linked with certain constructions of older Asian masculinities (Hunter, under consideration).

Policy responses to institutionalised and intersecting discriminations and inequalities continue to meet with varied success. The UK, taking its cue from an EU context, has been dominated by commitments to equalities mainstreaming, through tools such as gender impact statements, race equality statements, and various public duties (Fredman and Spencer, 2006). The ethos and practice of such approaches have been variously critiqued for conservatism, diluting the specificities of oppression, prioritising the economic over the social and technical process over action and outcome (Rees, 1998; Booth and Bennett, 2002; Daly, 2005; Squires, 2005, 2006; Walby, 2005; Ahmed et al., 2006; Bowes, 2006; Yuval-Davies, 2006; Jordan and Johns, 2007; Lindsay et al., 2007).

A further and less often considered problem with equalities policies is the ongoing failure to acknowledge the ambiguous relationship between institutional and individual racism and sexism within organisations. In the UK context, charges of the 'unwitting' (Home Office, 1999) or unconscious reproduction of racist and sexist institutional norms within a range of organisational contexts heighten anxiety and confusion around issues of gender and ethnicity. Professionals working within such contexts, like George in the excerpt which opens this chapter, experience 'a recurrent, and disconcertingly unpredictable, encounter with self' where values, behaviour and professional practice are rendered visible and problematic (Husband, 1996, p. 46). It is this 'encounter with self', the 'felt dimension' (Gunaratnam and Lewis, 2001: 133) of organisational moves to mainstream equality and diversity, that I explore in my research. Working at the intersection of the 'public' and the 'private'; I am interested in if, and how public sector professionals 'recognize themselves in the politics offered in their name' (Hollway and Jefferson, 1996: 390). [How] do they recognise and reconcile potentially conflicting social and professional identifications? And [how] do these negotiations contribute to constructing, reconstituting or resisting institutional racism and sexism? How is it that we can simultaneously recognise and deny the existence of social inequalities? In short, I am interested in 'the recognition denial paradox'.



## RELATIONALITY THROUGH A FEMINIST PSYCHOSOCIAL LENS

I call my approach to theorising and unpacking these paradoxical relations, 'feminist psychosocial'. By 'psychosocial' I am referring to a growing and varied body of interdisciplinary work which seeks to integrate the sociological and the psychological. Its proponents tend to embrace critical psychology/psychoanalysis and critical social theory. Notwithstanding the variation in this tradition, I have been critical of the way in which psychosocial theorising can underplay an analysis of gendered and racialised social relations, particularly where it considers the perspectives of those in positions of institutional power (Hunter, 2005a, 2005b). Thus my own approach is rooted in Kleinian object relations (Klein, 1975, 1997; Mitchell, 1986), theorising non-unitary, relational subjectivity and the importance of a dynamic unconscious. But, it also draws on a number of complementary traditions<sup>3</sup> to understand the social *politics* of 'race' and gender as these operate within institutions, and the interrelationship between 'surface' and 'depth' manifestations of raced and gendered social relations (see Simpson and Lewis, 2005). Thus, I use the term 'feminist' to situate the way I came to be doing critical and politicised academic work rather than to bound my project as concerned only with gender relations or feminist theorising.

Different strands of theory enable different aspects to an analysis. Critical 'race' theory (Higginbotham, 1992; Frankenberg, 1993; Mama, 1995; Mirza, 1997; Ahmed, 2004) identifies how a variety of social relations and in particular raced social relations constitute the 'structuring absences' (Skeggs, 1997) of social life. Feminist theory (Gilligan, 1982, 1993; Gilligan et al. 1990, 1998; Haraway, 1991, 1997; Brown and Gilligan, 1992; Kitzinger and Gilligan, 1994;<sup>4</sup> Butler, 1997; hooks, 2000) highlights how individuals constitute embodied (emotional) subjects situated in multiple intersecting histories. Psychosocial theory (Henriques et al., 1984; Hollway and Jefferson, 1996; Brown, 2000; Hoggett, 2000; Hollway, 2000, 2006; Clarke, 2006; Rosenail, 2006) develops complex conceptualisations of motivation and agency as cognitive and emotional, predicated on the dynamic tension between love and hate for the self and others.

Using these different ways of understanding the world *together* enables me to develop a layered analysis of the social which insists on complex interrelationship(s) between the individual and collective. This means recognising that the 'I' and the 'we', while related, can never be collapsed one into the other. The most developed attempt at such an integrated analysis in my own field of social policy is the work of the ESRC Research Group

on Care Values and the Future of Welfare (CAVA)<sup>5</sup> who work with a three-part ontological (individual), categorical (collective) and relational framework (Williams, 2000, see also 1999). My feminist psychosocial approach builds on this (Hunter, 2003, 2005b). It works with an expanded notion of the relational, what Craib (1989) calls the 'third level of analysis' between structure and agency, where social categories are negotiated through individual biographies, which are constituted through social relationships, and vice versa. This notion of the relational thus encompasses the biographical, situational, social/cultural and structural/institutional in the same frame. As such, the relational constitutes the point at which discourse meets experience and the cognitive and the *affective* are negotiated. It thus enables me to do the sort of intersectional work advocated by Brah and Phoenix (2004), connecting multiple dimensions of the social along multiple axes of differentiation.

At the categorical level, this feminist psychosocial perspective acknowledges that gendered and racialised social relations often remain 'hidden' within the everyday politics and practice of organisations' 'structuring absences', in Skeggs's (1997) terms. This 'hidden' nature is *part* of their power and provides part of the explanation as to why relations of inequality are reproduced even in contexts where inequalities are denounced. The work of Evelyn Brooks Higginbotham is worth citing at length on this. She sees 'race' as a 'metalanguage' or 'global sign' since:

It speaks about and lends meaning to a host of terms and expressions, to a myriad aspects of life that would otherwise fall outside of the referential domain of race. By continually expressing overt and covert analogic relationships, race impregnates the simplest meanings we take for granted. It makes hair 'good' or 'bad', speech patterns 'correct' or 'incorrect'. It is, in fact, the overdeterminacy of race in Western culture . . . that has permitted it to function as a metalanguage in its discursive representation and construction of social relations . . . whether race is textually omitted or textually privileged, its totalizing effect in obscuring class and gender remains. (Higginbotham, 1992: 255)

What Higginbotham's work demonstrates is the ways in which even when we do not directly talk about 'race', certain racialised meanings become attached to certain words (and ways of being). These words then operate as euphemisms for 'race'; common examples here are the notions of 'culture' or 'community' (see Hunter, 2006 for how this works in relation to education; Lewis, 2000 for social work; Worley, 2005 for community work). It is these subtleties which make the operation of 'race' difficult to unpick. Higginbotham's notion of metalanguage also encompasses the points at which 'race' becomes hypervisible. Nirmal Puwar's (2004) work with the UK Civil Service and in academia highlights a similar paradox

with gender and ethnicity where certain people – Black, women and minoritised subjects – become defined only in terms of their raced or gendered positioning, eclipsing other modes of identification.

Just as there are collective ways of thinking about social relations, there are also collective ways of feeling, ‘collective sentiments’ (Hoggett and Miller, 2000) which get attached to ‘race’, gender and other social relations. They are constructed through social relationships and get passed round organisations, permeating the everyday relations of the group. These collective sentiments are important to exploring how and why (individuals and) collectives become invested in and attached to particular ways of thinking and acting (Ahmed, 2004). They produce one part of the explanation as to what facilitates and blocks action within organisations (Hunter, 2005a; under consideration).

At the ontological level a feminist psychosocial approach recognises that the social world is both ‘beyond us and before us’ (Butler, 2005: 64). Following Donna Haraway, ‘nothing comes without its world. So trying to know those worlds is crucial’ (Haraway, 1997: 37). In order to understand any given perspective, it is important to understand the context of the person who offers that perspective. This context is structured through time, space and the ‘elsewhere’ (Gunaratnam, 2003) which includes national and transnational contexts. It is also ‘internally’ structured through the interplay between unconscious fantasy and conscious desire. Following Lavinia Gomez:

Our inner world is a changing dynamic process, with some more fixed and some more fluid patterns, both conscious and unconscious. These dynamics influence how we experience external reality and are also themselves influenced by our own experience of external reality. (Gomez, 1997: 2)

It is these material and symbolic contexts which constitute the hidden structures for our relational encounters. Subjectivity is always in flux because we constantly revise and reconstitute who we are through these relational encounters. Thus, because we are always in a process of becoming through relationships, our social locations are *never* entirely self-evident or transparent, even to ourselves.

Finally, these different theoretical elements together suggest that social change is neither rational nor linear. Neither collective mobilisation nor individual agency follow a simple certain input = certain output model. This is not least the case because where meaning is relational it is dialogically constituted and contested (Brown, 1998). Thus, we cannot know all elements of a given situation, we have ‘partial vision’ (Haraway, 1991). Because our attachments are multiple structured through the conscious and unconscious, there are contradictions between individual desires and

public commitments. We can be both 'victim' and 'perpetrator', responsible and innocent, thus we can sometimes seem to act 'irrationally', 'against ourselves' (see Hunter, 2005a). There is a distinction here from 'either/or' dualistic perspectives on agency where social change involves dramatic transformation. Because subjects are positioned *within* and *against* social relations of inequality, they will inevitably engage in constant struggle/work and negotiation to achieve certain 'ends', whether these be resistance and change or continuity.

## SPEAKING ABOUT AND SPEAKING THROUGH

I turn now to one of the ways a feminist psychosocial perspective enables me to unpick the 'recognition denial paradox' I identified at the beginning of this chapter. Because this approach understands recognition as structured through the interplay of social interaction and unconscious symbolic interaction, it enables us to see how people are so much more than their public expressions of (categorical) identification. Such an approach can understand the ways in which recognition can be *both* constraining *and* enabling. So this is a perspective that refuses to reduce politics to the absolutes often enacted in the name of recognition.

In my research with welfare professionals working in health and social care I make the distinction between *speaking about* and *speaking through* social relations. This distinction enables me to highlight the important tensions and ambivalences produced through the gap between the 'I' and the 'we'. In contrast to other research which finds its participants reticent to speak about the operation of gender and ethnicity within their working contexts, my findings identified an increasing tendency for welfare professionals to speak about institutional racism and sexism. This suggests an increased willingness and ability to recognise race and gender as discursively structuring organisational life. Participants talked about a range of issues including unequal employment practices, working hierarchies structured according to gender and 'race', and other inequalities in working interactions, decision-making processes and other organisational practices such as ethnic monitoring, all contributing to the verbal, symbolic and practical material reproduction of inequalities. However, as we saw in George's example at the beginning of this chapter, these welfare professionals continued to have incredible difficulty in positioning themselves within these social relations; positioning the 'I' within a gendered and raced 'we'. So for George, although he has had to reflect on the ways in which gender and ethnicity structure his working relationships, he 'can't clearly pin [it] down', 'can't . . . put my finger on

what it is' and why it matters in his working relationships; this remains concealed and 'locked [away]'. Although George has a 'strong sense' that gender is relevant, he cannot understand what this means for him in the working environment.

The difficulties research participants had in making sense of these relations for themselves often stemmed in large part from the way in which discussions of gender and ethnicity were framed in terms of binary, hierarchical disadvantage and advantage. Such binary constructions limited the options available to participants for conceptualising their own gendered and raced positioning, as *either* racist/sexist *or* as victim of racism/sexism. Taking Lucy as an example here:

I don't affiliate myself, with um, being a part of the female [pause] um [pause] population . . . I'm not hung up on women's groups or . . . I don't categorise myself [that way] I don't relate to it. Or that you know, you feel that women are downtrodden or whatever, I don't relate to it. (Lucy, 38, white, woman nurse manager)

Unsurprisingly, participants were resistant to framing their lives (only) in such simplistic terms where they were seen as 'downtrodden' victims or as 'oppressive' employers or colleagues (see Hunter, 2005b esp. Chapter 9 for more of the variety of ways in which participants resisted positioning the self). So recognition of their positioning as part of a social group was often coupled with a resistance to thinking through the troubling implications for participants' own lives.

The notion of 'speaking about', then, refers to the limited cognitive understanding of the reality of racism and sexism as structuring relations of gender and 'race' at work, home and leisure. 'Speaking through' gender and 'race', however, implies an additional affective dimension to such understandings, where individuals are able to position themselves within these structures, linking their biographies to institutional biographies. It is through such linking that it is possible to begin to explore their own ambivalent desires, seeing themselves as at once powerful and powerless, connected to but not determined by a 'we'. 'Speaking through' thus, implies a 'relational identification' with differentiated 'Others' (Hunter, 2003).

Making what may seem like such a small distinction is crucial to understanding the operation of gender and 'race' in organisations as it can provide part of the explanation for a gap between rhetoric and practice. It can account for the way recognition at a categorical level can ironically serve to impede action, because it takes the place of recognition at the relational level. Thus, the recognition of racism or sexism can sometimes serve to hide the recognition of race and gender as historical and social relations

within which we are relationally positioned in our everyday activities. It can serve as a means of 'abdicating responsibility' (Hunter, 2005b) for racism and sexism. Responsibility is re-theorised through relationship; taking responsibility means acknowledging implication in rather than taking the blame for (see Hunter, 2003).

## CONCLUSIONS

I have only been able to briefly introduce some key elements of my feminist psychosocial approach to researching equalities. Its key advantage is that it provides a more realistic starting-point for organisational change for equality. Returning to the policy and practice context I presented at the beginning of this chapter, recognition of intersecting differences and discrimination can constitute a starting-point for effective organisational practice. But, the importance of recasting difference and inequalities in relational terms is that this proposes a more complex understanding of inequalities, as these connect us to changing discursive structures and from where we might begin to form the basis of a moral vocabulary based on 'equal worth' (Williams, 1999). This may enable us to think not in terms of parity, blame, fixing innocence or guilt, but of connection and 'truth of encounter' between those differently positioned, of the kind it seems George is struggling to achieve at the beginning of this chapter where recognition is clearly not enough. If it fails to acknowledge the affective dimension of organisational life, including the destructive capacities of organisational subjects, work to combat racism and sexism will always fall short of the mark. It will tend to continue to focus on superficial awareness raising as the key to organisational change. But policy and practice concentrating on awareness raising considers only the ontological and categorical dimensions of organisational life. It misses the important work that goes on at the relational level to *connect* the 'I' and the 'we' which facilitates commitment to and investment in change.

As I found in my work in health and social care and education, recognising complexity, difficulty and conflict can actually be productive of important connections which can form the foundations for research practice, but also for positive organisational change (Hunter, 2005a). Organisations must find ways of holding ambivalence and tension rather than splitting gendered and raced difference. Both individually, but also organisationally, this will mean expanding room for discursive manoeuvre to construct an 'elsewhere within' (see Bondi, 2004) which is based on mobilising ambivalence and contradiction rather than suppressing it.

## NOTES

1. This excerpt and the other I use later in the chapter comes from an interview undertaken for a doctoral study (Hunter, 2005b) in an English health and social care context (UK Economic and Social Research Council ref. 42200124257). George is, of course, a pseudonym. The research was qualitative and involved serial in-depth interviews with a range of health and social care professionals working in UK health-care organisations. The interviews focused on their involvement in the health policy-making process. The aim was to explore how they negotiated gendered, raced and professional identifications and how this impacted on organisational process and policy development.
2. The conflation of Asian/Muslim in the popular and policy discourse is important to note because it points to the ways in which religion, ethnicity and 'race' are conflated in contemporary geopolitics post-September 11, 2001. Although I do not have time to unpick this complex issue here, see Frankenberg (2005) and Rattansi (2005) for a start. In the UK context Gail Lewis puts this well: 'it is a constant flip flop among racial, cultural or religious difference that provides the centre point for struggles over the designation of which moralities, practices of everyday life and identifications can be claimed as signifying core British values' (2005: 552).
3. I separate these in the following list in order to give due to the (sub)disciplinary origins of different elements of my perspective. Much of this work could be positioned in one, other, or even all of the categories. Equally the categories should not be taken as homogeneous or internally consistent (see, for example, note 4 on Carol Gilligan's position in feminist theory).
4. Carol Gilligan's work is largely interpreted as liberal feminist. Against this grain however, I have strongly argued (Hunter, 2005b) that it is liberal feminist authors who invoke Gilligan's work in support of such an analysis, who perpetuate such a reading. Such readings tend to be based on narrow interpretations of her first major publication *In a Different Voice* (Gilligan, 1982, 1993), excluding the vast body of her work published over the subsequent 25 years. In particular, her voice-centred relational methodology advocates a highly complex approach to exploring the multiple contestation of meaning and meaning making (see, for example, McLean Taylor et al., 1995). For other fairer critiques of Gilligan's work see Susan Hekman (1995), Selma Sevenhuijsen (1998) and Wendy Hollway (2006).
5. This group was based at the University of Leeds 2000–2006 under the directorship of Fiona Williams.

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## PART IV

### Psychology of equality, diversity and inclusion



# 15. Challenging the status quo: diversity, employee voice and proactive behaviour

**Johannes Rank**

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## INTRODUCTION

'The expression of voice, in the form of criticism that seeks to improve the organization, is central to a principled vision of true organizational democracy' (Cheney, 1995, p. 186). This quote summarises why I was attracted to the study of employee voice, initiative and innovation as a postgraduate psychology student in the US and Germany (Rank et al., 2004a, 2004b), have completed my doctorate in this domain (Rank, 2006a), and explore related issues in my current work (Rank et al., in press). Within occupational psychology and organisational behaviour, this research falls into the expanding field of proactivity studies, which is concerned with self-started, forward-thinking and change-orientated behaviour (Crant, 2000; Parker et al., 2006).

The purpose of this chapter is not only to integrate the psychological diversity and proactivity literature but also to engage in voice by challenging the status quo and providing suggestions for conceptual improvements and future research. An additional aim is to make diversity-related insights gained from complex quantitative psychological studies more obvious and accessible to scholars from other disciplines. My primary contribution is the development of an integrative model (see Figure 15.1) explicating some of the psychological processes that may increase the likelihood that diverse employees, especially those from disadvantaged groups, will engage in proactive behaviour, particularly in voice and initiative. Throughout the chapter, I describe these antecedents and explain their connections to proactivity outcomes.

The study of employee voice and initiative is intertwined with issues of diversity, equality and inclusion, because members of traditionally disadvantaged groups (for example, women, individuals from ethnic minority groups, gay, lesbian and bisexual employees, foreign nationals, and

those from lower social classes) frequently experience restrictions on the expression of dissenting views and on their power to effect change (Bowen and Blackmon, 2003; Dipboye and Colella, 2004; Roberson and Stevens, 2006). As Allen (1995) noted, high levels of authentic voice in an organisation are an indicator of successful diversity management. Proactive contributions are critical to achieving several of the frequently suggested benefits (for example, improved problem-solving, innovation and marketplace understanding) of progressive diversity management approaches that truly harness the entire scope of employee differences (Kirton and Greene, 2004; Bassett-Jones, 2005).

Unfortunately, there is still an astonishing lack of rigorous empirical research demonstrating these benefits, which rest on the assumption that diverse employees actually speak up and take initiative. In particular, voice and initiative function as facilitators in the innovation process, because creative ideas are more likely to be implemented successfully if they are communicated and supported by proactivity (Rank et al., 2004b). Hence, there is a need for conceptual and empirical work overcoming the neglect of diversity issues within the proactivity field.

The fourfold structure of this chapter proceeds as follows. Based on a brief review of quantitative studies, including my own research, I first identify relevant situational and individual antecedents of voice and proactivity. Second, drawing on the diversity literature, I suggest a few group-level conditions that may influence the level and effectiveness of diverse employees' voice and proactivity. Third, I discuss relevant issues and future research directions in relation to three specific diversity factors (gender, sexuality, nationality) that have received at least minimum consideration in voice and proactivity research. Acknowledging limitations of positivist–quantitative approaches, I finally sketch a few avenues for more fine-grained qualitative research inspired by the communication literature, hence highlighting the value of an interdisciplinary approach.

## SITUATIONAL AND INDIVIDUAL ANTECEDENTS OF VOICE AND PROACTIVITY

Since the early 1990s, journals such as the *Academy of Management Journal*, the *Journal of Organizational Behavior*, *Journal of Applied Psychology* and *Human Performance* have featured an increasing number of articles on proactivity concepts such as proactive personality (Bateman and Crant, 1993), personal initiative (Fay and Frese, 2001), taking charge (Morrison and Phelps, 1999), voice behaviour (LePine and Van Dyne, 2001) and proactive service performance (Rank et al., 2007). This development reflects

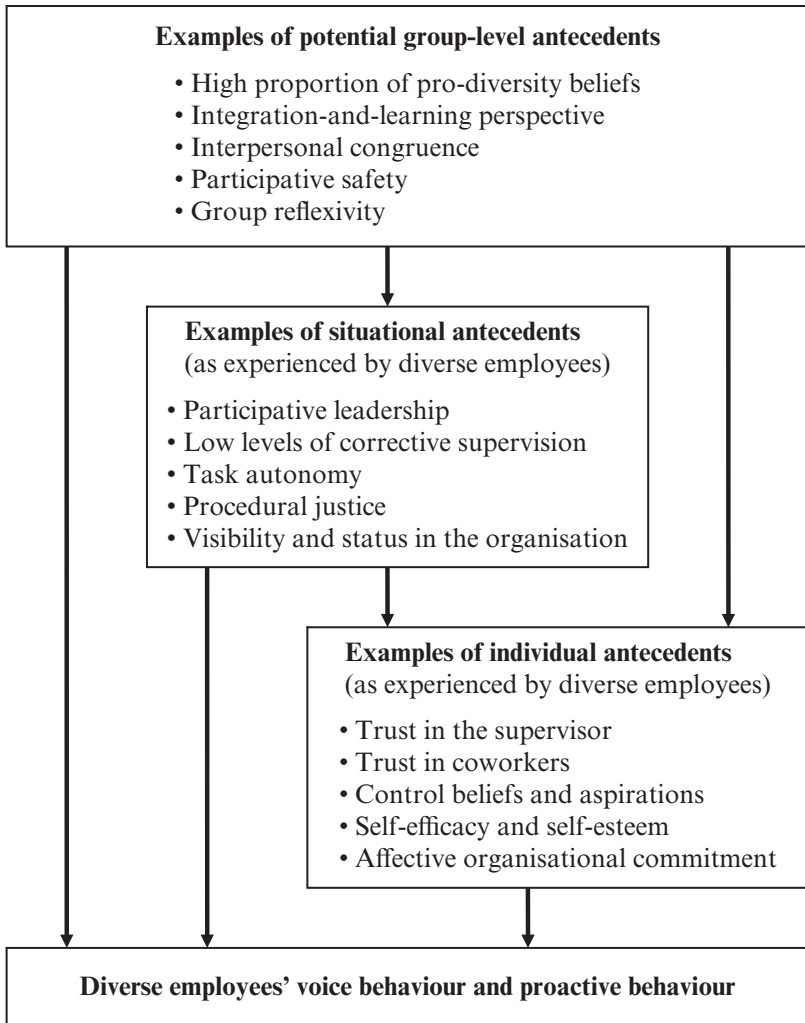
business trends reducing managers' surveillance functions while enhancing subordinates' responsibilities (Frese and Fay, 2001). In his review, Crant (2000) defined proactive behaviour as 'taking initiative in improving current circumstances or creating new ones; it involves challenging the status quo rather than passively adapting to present conditions' (p. 436).

Van Dyne and LePine (1998) defined 'voice behaviour' as constructive change-orientated communication or 'promotive behavior that emphasizes expression of constructive challenge intended to improve rather than merely criticize' (p. 109). Their questionnaire measure assesses whether employees challenge the status quo in their work group, state their opinion even if others disagree, encourage others in their group to articulate their points of view, develop recommendations for improvement, and speak up with innovative suggestions for change. Related concepts include taking charge ('voluntary and constructive efforts, by individual employees, to effect functional change with respect to how work is executed'; Morrison and Phelps, 1999, p. 403) and personal initiative ('work behavior characterized by its self-starting nature, its proactive approach, and by being persistent in overcoming difficulties'; Frese and Fay, 2001, p. 134). Accordingly, in my doctoral research, I defined proactive customer service performance as individuals' self-started and long-term-orientated service behaviour exceeding prescribed requirements (Rank, 2006a). Quantitative research has identified several individual and environmental antecedents of such employee behaviours (for example, Frese et al., 1996; LePine and Van Dyne, 1998; Crant, 2000; Parker et al., 2006; Rank et al., 2007).

### **Situational Antecedents**

Research into situational antecedents is fruitful for the diversity domain, because such factors may be modified to facilitate proactive behaviour among a wide range of employees. The situation box in Figure 15.1 lists some of the relevant variables, which all reflect aspects of individual employees' (rather than an entire unit's) experienced work situation. One of the most consistent findings is that participation in decision making relates positively to employee voice (Fuller et al., 2006; Rank et al., 2007). Person–environment interactions suggest that participation enhances voice even among employees with attributes usually not conducive to voice, such as low self-esteem and an adaptive (rather than innovative) cognitive style (Janssen et al., 1998; LePine and Van Dyne, 1998). Drawing on Weick's (1995) work on sensemaking, I propose that participative managers may facilitate 'sensemaking as arguing', which involves confrontational idea exchanges as a means of integrating diverse opinions. Research into other proactive behaviours also demonstrates that measures enhancing freedom





*Figure 15.1 A model of diversity, employee voice and proactive behaviour*

and control via participation or task autonomy are conducive (Frese et al., 1996; Parker et al., 2006; Rank et al., 2007). Two other proactivity facilitators relevant to diversity and inclusion are employees' perceptions of procedural justice (McAllister et al., 2007) and their visibility and status (operationalised as perceived organisational support) within the organisation (Fuller et al., 2006).

Based on an integration of American leadership and motivation theories as well as German action theory (Frese and Rank, 2006), my PhD research, conducted in a large financial services organisation, examined associations between leadership and subordinate proactivity, including moderators and mediators of these relationships (Rank, 2006a). Participative leadership was the strongest positive predictor of proactive service performance (Rank et al., 2007) and also associated with voice and initiative. Active-corrective transactional leadership (that is, monitoring and punishment of errors or deviations) was negatively correlated to proactivity. According to the augmentation hypothesis put forward by transformational leadership scholars (Bass et al., 2003), followers of visionary, inspirational and intellectually stimulating leaders exhibit greater effort and productivity than those exposed only to transactional practices. Frese and Fay (2001) suggested that the performance effects of transformational leadership may be caused by increased initiative. Viewing voice as an equitable form of dialogue (Eisenberg and Goodall, 2001), I argue that only democratic (rather than authoritarian) forms of transformational leadership truly promote voice. In support of this hypothesis, I found that transformational leadership positively related to subordinates' voice and initiative only when combined with low levels of corrective supervision or high levels of participation.

### **Individual Antecedents**

Rather than focusing on stable personality predictors of initiative and voice (for example, extraversion, conscientiousness, need for achievement; Frese et al., 1996; LePine and Van Dyne, 2001), I briefly discuss malleable factors that can actually be enhanced to promote proactivity. Significant correlates of voice identified in American field studies include individuals' self-esteem (LePine and Van Dyne, 1998), their overall identification with the organisation (Fuller et al., 2006) and their affective organisational commitment (emotional attachment to the organisation; Rank et al., 2007). Employees' general or role-breadth self-efficacy (their belief in their capability to successfully perform a wide range of activities; Frese et al., 1996; Morrison and Phelps, 1999; Parker et al., 2006) and control aspirations (expectations to be in control over situations and influence outcomes; Fay and Frese, 2001; Parker et al., 2006) also predicted proactive behaviour.

This pattern of findings suggests that disadvantaged employees may sometimes exhibit less voice and proactivity because of reduced levels of critical individual and situational antecedents. For example, biased performance appraisals (Heilman et al., 2004) and reduced access to adequate role models and mentors (Ragins and Cotton, 1991) compromise procedural justice perceptions and self-efficacy. Accounts of diversity-related

incidents frequently feature examples of unfair treatment by management (Roberson and Stevens, 2006), such as excessive sanctions for otherwise tolerated behaviour (reflecting disproportionate levels of corrective supervision) or being denied access to developmental opportunities. Such experiences may undermine subordinates' trust in leadership, the primary attitudinal mediator linking supervisory practices to subordinates' proactivity, as identified in one of my structural equation models (Rank, 2006b). Trust in coworkers has been identified as another important facilitator of proactive behaviour (Parker et al., 2006). Trust is critical to proactivity, because it enables people to 'accept vulnerability based upon positive expectations of the intentions or behavior of another' (Rousseau et al., 1998, p. 395). Hence, individuals' experienced work situation and group-level factors may influence proactivity not only directly, but also via individual factors such as trust and commitment.

## **GROUP FACTORS FACILITATING VOICE AND PROACTIVITY AMONG DIVERSE EMPLOYEES**

A better understanding of the group-level conditions under which diverse employees exhibit voice and initiative contributes to a resolution of the diversity dilemma. Diversity is a double-edged sword, because it may not only 'give rise to varied ideas, perspectives, knowledge and skills' (Polzer et al., 2002, p. 296), but also disrupt group processes because of various problematic effects explicated in social psychological models such as social identity theory and self-categorisation theory (Van Knippenberg et al., 2004). The potential devaluation of contributions made by minority employees can be partially explained by in-group favouritism resulting from self-categorisation of dominating group members as representatives of the majority (Marques et al., 2001). To achieve benefits such as improved innovation, it is essential that diverse employees actually voice concerns, speak up with suggestions and take initiative (Rank et al., 2004b).

Obviously, diverse employees will be more likely to engage in voice and proactivity when organisation members endorse pro-diversity beliefs, that is, affirmative beliefs about the value of diversity to group functioning (Homan et al., 2007). This corresponds to the integration-and-learning perspective on diversity, which implies that diverse employees feel truly respected and that task conflict is viewed positively (Ely and Thomas, 2001). The discrimination-and-fairness perspective tends to neglect differences, while the access-and-legitimacy perspective tends to value minority employees' contributions only when they are instrumental in the attraction and retention of certain customer groups.

Adopting an identity negotiation approach informed by the theories of self-categorisation and self-verification, Polzer et al. (2002) identified interpersonal congruence ('the degree to which group members see others in the group as others see themselves', p. 296) as a critical moderator. Demographic diversity facilitated creative problem-solving only when interpersonal congruence was high, a condition that some groups achieved quickly. If a minority employee's self-views (for example, of being someone who communicates good ideas) are not in alignment with the majority's view of this person, the majority will not be perceived as a receptive audience for voice or other proactive efforts.

Although minority dissent promotes creativity in groups, it predicts greater innovation (that is, idea implementation) only in groups with high participation (De Dreu and West, 2001). Longitudinal research identified the team climate factor 'participative safety' (for example, everyone's view is listened to even if it is in a minority) as the best climate predictor of the number of innovations implemented in management teams within the British National Health Service (West and Anderson, 1996). Diverse employees' proactivity may also be facilitated by group reflexivity, that is, the extent to which group members reflect upon the group's objectives, strategies and processes and adapt them to current or anticipated circumstances (Schippers et al., 2003). On the contrary, uncritical reliance on habitual routines, usually established by members of the majority, likely stifles proactivity.

## VOICE AND PROACTIVITY IN RELATION TO SPECIFIC DIVERSITY DIMENSIONS

Unfortunately, little proactivity research has explicitly considered specific diversity dimensions. Because the literature includes starting-points for a consideration of the role of gender, sexuality and nationality for proactivity, I now discuss these factors, demonstrating that the model of diversity and proactivity may be tailored to specific groups of employees (for example, women; gay, lesbian and bisexual employees; foreign nationals). I provide examples illustrating the frequent lack of conducive proactivity determinants among disadvantaged employees and the need to add unique antecedents specific to each diversity dimension to the model.

### **Gender, Employee Voice and Proactive Behaviour**

Most proactivity studies including gender data have found either no or a small but significant relationship indicating lower voice or initiative

scores for women. Van Dyne and LePine (1998) reported lower self-rated, coworker-rated, and supervisor-rated voice scores for women. LePine and Van Dyne (1998) found lower coworker voice ratings for women, arguing that women have less influence and thus less confidence than men in mixed sex groups. In the same study, women reported lower self-esteem and were more frequently exposed to traditional rather than self-managed styles of management. Den Hartog and Belschak (2007) reported lower initiative as well as affective commitment self-ratings among women in a Dutch sample. This pattern of findings is consistent with my model in that occasionally reduced proactivity levels among women may be caused by lower levels of some of the situational (for example, participation) and individual (for example, affective commitment, self-esteem) antecedents.

One of the few published studies (Ashford et al., 1998) explicitly devoted to the study of gender-related proactivity revealed the importance of experienced context favourability (for example, strong organisational support and trustworthy relationships with key decision makers) for women's willingness to sell gender-equity issues. Therefore, additional managerial support and approachability variables may be added to a gender-specific version of the model. Another worthwhile avenue for research would be to explore whether gender differences in leadership style translate into a female advantage in fostering voice and initiative among subordinates. Although such gender differences are small, meta-analytic research (Eagly and Johnson, 1990; Eagly et al., 2003) has revealed that female supervisors, on average, engage in significantly more participative leadership, more transformational leadership and less corrective transactional leadership than their male counterparts. This reflects exactly the leadership pattern that is most conducive to subordinate proactivity (Rank, 2006a; Rank et al., 2007). On average, female managers may be more likely to create the previously noted group conditions (for example, participative safety and reflexivity).

Another important addition to my model would be a consideration of the effects of stereotype-induced biases on factors such as procedural justice and trust in leadership. Psychological research has demonstrated that women receive lower performance and competency ratings on male gender-typed tasks when their effectiveness is ambiguous (Dipboye and Colella, 2004; Heilman et al., 2004). Biased evaluations reflect cognitive distortions resulting from the discrepancy between assessors' descriptive gender stereotypes (that is, what women and men are like and are not like) and their views of the qualities necessary to perform these tasks. Assertive forms of voice or initiative may often be viewed as male gender-typed. To bolster the male gender type of a job description in one of their

experiments, Heilman et al. (2004) included proactive responsibilities such as 'breaking into new markets, keeping abreast of industry trends, generating new clients' (p. 417). Because proactivity is self-started and change-orientated, performance criteria are often ambiguous, making assessments of voice or initiative prone to stereotype influence.

Because of prescriptive gender stereotypes (that is, how women and men should be and should not be), women may also experience negative consequences when their proactive accomplishments are irrefutably excellent. When tasks are male-gender-typed, successful women are often rated as more interpersonally hostile and less likable, with the latter effect resulting in fewer recommendations for higher salaries and special career opportunities (Heilman et al., 2004). As Seibert et al. (2001) noted, supervisors may sometimes punish employees high in voice 'whom they perceive to be too critical' (p. 867). Such effects may be exacerbated for women who engage in male-gender-typed forms of voice and initiative (for example, attacking computer problems in one's department and fighting assertively for technological improvements). Research should examine whether managers' judgements of the effectiveness of women's and minority employees' proactive contributions are subjected to such unfair biases.

### **Sexual Orientation, Employee Voice and Proactive Behaviour**

One of the few theoretical models of diversity and proactivity concerns the role of sexual orientation in organisational voice (Bowen and Blackmon, 2003). Inspired by Noelle-Neumann's (1974) spiral-of-silence theory, which explains how minority positions in society become weaker when people perceive a threat of isolation that they fear, Bowen and Blackmon proposed an individual spiral of silence. In their model, the identity conflict triggered by repression of an important aspect of one's personal identity (that is, silence on one's sexual identity) escalates into the repression of voice regarding organisational issues via a set of intertwined processes (for example, reduced social and task-related exchange with coworkers resulting from inhibited natural interactions). Of course, the authors note that positive effects of disclosure on voice can be achieved only in supportive climates that facilitate trust in coworkers and emotional attachment (that is, affective organisational commitment), two factors in my model that may function as important facilitators of voice and proactivity among gay, lesbian and bisexual employees.

Some indirect empirical support for the spiral of silence comes from large-scale US field studies revealing positive relationships of degree of disclosure with participation in work issues (Ragins et al., 2007) as well as affective organisational commitment and reduced role conflict (Day and

Schoenrade, 1997). However, Ragins and coauthors concluded that their findings 'challenge the assumption that disclosure automatically leads to positive outcomes' (p. 1114). Whereas degree of disclosure significantly related only to participation, fear of disclosure among those who had not come out was significantly associated with 13 out of 15 criteria, many of them likely undermining proactivity (for example, greater depression and turnover intention; fewer promotions; lower organisational and career commitment). The factors associated most strongly with reduced fear were support from coworkers and supervisors. In a proactivity model tailored to sexuality issues, degree and fear of disclosure should be added and linked to factors such as trust in coworkers. Even in allegedly supportive environments, disclosure sometimes leads to the experience of 'insidious and subtle acts of discrimination that combine overt acceptance and covert rejection' (Bowen and Blackmon, 2003, p. 1402), including potential dismissals of proactive contributions.

Based on a sophisticated integration of stigma theory and self-verification theory, Ragins (2008) discussed several anticipated positive (for example, renewed energy, enhanced psychological coherence) and negative (for example, adverse treatment) consequences of disclosure. Future research may investigate whether different approaches to revealing (Clair et al., 2005) are distinctively associated with one's voice or initiative and with others' responses to one's proactive endeavours. Whereas the less confrontational tactics of signalling (hinting at one's difference) and normalising (making one's difference seem commonplace) may entail lower risks of rejection, gay, lesbian and bisexual employees in organisations with an integration-and-learning perspective (Ely and Thomas, 2001) may sometimes pursue a differentiating approach that involves a redefinition of the meaning attached to their social identity, 'transforming traditionally stigmatized differences into assets' (Clair et al., 2005, p. 84).

In the US, Ragins and Cornwell (2001) found negative relationships between experienced discrimination and several variables relevant to proactivity (for example, affective organisational commitment, organisation-based self-esteem). The factor most strongly linked to reduced discrimination was the welcoming of same-sex partners at company social events, a practice that reflects true comfort more strongly than various standard procedures (for example, including sexual orientation in non-discrimination policies and diversity training). In the UK, such policies have been widespread since the implementation of the Employment Equality (Sexual Orientation) Regulations 2003 (Daniels and Macdonald, 2005). However, a recent UK study of 154 lesbian, gay and bisexual (LGB) workers (Colgan et al., 2007) revealed an implementation gap between diversity policy and practice even in organisations listed as LGB

friendly in a national workplace equality index. This study suggests a need to study the diversity-related proactive behaviour of coworkers and managers, because a 'key indicator of inclusion for LGB respondents was the extent to which homophobia (in addition to other forms of discrimination) was proactively challenged at work' (p. 606). Because protective legislation may not sufficiently empower LGB employees to engage in voice and initiative, future research should further explore how supportive workplace conditions can be best achieved. In general, minority employees who fear repercussions may be hesitant to speak up against the status quo or to show self-started initiatives.

### **Nationality, Employee Voice and Proactive Behaviour**

Foreign nationals, including expatriates and labour immigrants, may also often experience uncertainty regarding others' responses to voice and proactivity because of differences in cultural values (Schwartz, 1999; Hofstede, 2001). In a study of more than 1,000 young employees from six countries, Claes and Ruiz-Quintanilla (1998) identified significant relationships between four cultural values and several proactive career behaviours. Specifically, individualism related positively to career planning, power distance negatively to consultation, uncertainty avoidance negatively to skill development as well as networking, and 'masculinity' negatively to skill development, consultation and networking. The label 'masculinity versus femininity' (the extent to which social gender roles are distinct and tough values like assertiveness prevail over tender values; Hofstede, 2001) may be criticised, as it reflects gender stereotyping. The researchers argued that 'femininity' facilitates the building of positive relationships with supervisors and coworkers. Considering the role of trust in my model, similar findings may be obtained in relation to voice and other proactivity criteria. Future research may examine whether those with a cultural background conducive to proactivity who work in a culturally distant country show reduced proactivity or experience negative responses.

Proactive behaviours shown by foreign idea champions may frequently violate cultural expectations for appropriate innovation championing approaches (Shane et al., 1995). For example, innovation champions need to work through established organisational rules in countries high in uncertainty avoidance and gain support from higher-level authorities in power distant societies (ibid.). It may also be explored whether cultural values moderate relationships between some of the situational factors and proactivity. For example, participation may most effectively facilitate voice and initiative in countries with low power distance (Rank et al., 2005). In the GLOBE leadership study of 61 countries, participative



leadership was particularly positively endorsed in the Anglo cluster, which included the UK (House et al., 2001).

An issue with many cross-cultural studies of individuals' work behaviour is that they use country-level scores obtained from Hofstede's work rather than measuring individuals' current standings on such values (Kirkman et al., 2006). In studies of foreign nationals' proactivity, values need to be explicitly assessed, as it cannot be assumed that they are consistent with the home or host country's average. Applications of the social-psychological theories of value contents and value structures (Schwartz, 1992) would be valuable, because they entail both country-level (for example, intellectual autonomy, egalitarianism) and individual-level (for example, self-direction, stimulation) values relevant to voice and proactivity.

A meta-analysis of expatriate adjustment (Bhaskar-Shrinivas et al., 2005) suggests that self-efficacy and autonomy, two factors included in my model, may be critical to expatriates' proactivity, because these two variables significantly predicted work adjustment (comfort with tasks during the expatriate assignment). Drawing on social exchange and social comparison theories, Ang et al. (2003) demonstrated that foreign employees in Singapore reported lower distributive justice perceptions and received lower supervisor ratings of job performance and helping behaviour than local employees. Such differences may be partially due to employment disadvantages and managers' tendencies to provide higher ratings to ratees who are similar to themselves. In the UK, discrimination based on nationality, national origin, race or ethnicity has been unlawful since the Race Relations Act 1976, although major immigrant groups (for example, Indian, Pakistani and African Caribbean; Robinson, 2006) still tend to experience segregation into labour markets and low hierarchy levels that largely preclude extensive voice and proactivity.

High levels of democratic participation among foreign nationals, as reflected in voice and initiative, may be considered as an indicator of integration. Berry's (2001) psychological acculturation model distinguishes four acculturation strategies (integration, assimilation, separation, marginalisation), which represent combinations of two dimensions (the maintenance of one's original culture and the contact sought with members of the new culture). This model may be criticised, because 'the typological discourse focuses our attention firmly on the individual in a manner which threatens to remove responsibility for particular forms of multicultural relations from wider, collectively driven sociopolitical forces' (Bowskill et al., 2007, p. 795). Studies of foreign employees' voice and proactivity should identify societal, organisational and group-level antecedents enabling them to truly participate in organisations' political processes. As Berry (2001) noted, the integration strategy can be pursued only in

explicitly multicultural environments that meet preconditions such as low levels of discrimination and widespread acceptance of the belief that cultural diversity is valuable to society. At the group level, this corresponds to a high proportion of pro-diversity beliefs, as suggested in my model.

## CHALLENGING THE STATUS QUO IN VOICE AND PROACTIVITY RESEARCH

While the model of diversity and proactivity includes many of the factors suggested by extant psychological research, additional antecedents may be included. For example, a comprehensive review of the impact of affect variables on creativity, innovation and initiative (Rank and Frese, 2008) suggests that positive moods and several discrete positive emotions (for example, pride, joy, hope) facilitate these outcomes. Numerous laboratory and field studies have revealed consequences of positive affect that are critical to proactivity (for example, enhanced cognitive variation, risk-taking, intrinsic motivation and persistence). Proactivity among employees from disadvantaged groups may often be undermined by negative affect and by lack of positive affect resulting from discrimination and reduced levels of various of the variables included in my model. Research demonstrating that proactive contributions made by diverse employees actually facilitate constructive change is desirable from a diversity management perspective (Kirton and Greene, 2004). With respect to the different change approaches identified by Van de Ven and Poole (1995), highly challenging forms of voice might trigger dialectical types (change resulting from confrontation and subsequent synthesis of opposing interests), whereas other forms may contribute to teleological types (change emanating from purposeful cooperation guided by commonly shared goals and envisaged end states).

### **Conceptual and Methodological Issues in Mainstream Research**

The status quo in mainstream proactivity research may be challenged. Some descriptions of proactive behaviour (for example, 'People can intentionally and directly change their current circumstances, social or nonsocial'; Bateman and Crant, 1993, p. 104) can be perceived as ignorant of the various disadvantages experienced by diverse groups of employees. Members of disadvantaged groups may also find it difficult to agree with questionnaire items, such as, 'if I see something I don't like, I fix it' (ibid., p. 112), which are used to assess whether someone's personality is proactive rather than passive. Definitions of several proactivity variables reflect a management bias. Within the domain of organisational citizenship

behaviour (OCB), ‘civic virtue was garbled in the process of operationalization’ (Organ, 1997, p. 92), because early OCB measures were derived from interviews asking managers which subordinate behaviours they like but cannot enforce. ‘Courageous communications that challenge norms or support unpopular views were not included’ (Van Dyne et al., 1994, p. 794). According to current conceptualisations, voice and taking charge must be ‘constructive’ (Morrison and Phelps, 1999; Van Dyne and LePine, 1998) and personal initiative ‘consistent with the organization’s mission’ (Frese et al., 1996, p. 38). It is problematic from an equality perspective that those who decide what counts as constructive are usually powerful stakeholders such as managers.

Various practices in proactivity research are not ideal to give underprivileged employees a voice and are representative of quantitative–positivist limitations (for example, writing concept definitions and questionnaire items without employee input; treating unusual cases as outliers; reducing open-ended interview responses to judgemental ratings). Similarly, ‘dubious generalizations made from laboratory studies have, at times, alienated diversity training practitioners’ (Pendry et al., 2007, p. 29) because of the questionable external validity of social–psychological experiments. Proactivity researchers should additionally consider options for qualitative data analysis, such as interpretative phenomenological, grounded theory and narrative analysis (Lyons and Coyle, 2007). Such approaches foster democratic exchange in research by truly giving a voice and listening to the views of underprivileged individuals.

The various forms of proactivity offered by diverse employees cannot be captured thoroughly by extant proactivity concepts (for example, voice behaviour, personal initiative), which are construed as unidimensional concepts and measured with rather simplistic rating scales. A starting-point for the development of a multifaceted measure is Meyerson’s (2001) fascinating qualitative research into tempered radicals. By using a spectrum of strategies ranging from subtle acts of disruptive self-expression to the building of strategic alliances, tempered radicals successfully challenge the status quo and gently influence their organisations’ cultures. A more fine-grained understanding of voice and proactivity may also be gained by considering literature from the field of organisational communication.

### **Implications of the Communication Literature**

Definitions of voice in the communication domain reflect that not everybody is empowered to speak up and be heard: according to Eisenberg and Goodall (2001, p. 38), ‘voice manifests itself in the ability of an individual or group to participate in the ongoing organizational dialogue’.

Consistent with Hirschman's (1970) exit–voice–loyalty framework, they noted that voice reflects a decision to speak up against a dissatisfactory status quo rather than remain silent and stay or give up and leave. Gorden (1988) distinguished four types of voice along the two dimensions active–passive and constructive–destructive. Ford and Ford (1995) distinguished various speech acts (for example, assertives, directives, expressives) in different phases of change-orientated communication (for example, conversations for initiation, performance and closure). Kassing (2002) identified five different forms of upward dissent (direct-factual appeal, repetition, solution presentation, circumvention and threatening resignation). Such fine-grained concepts could be added as specific outcomes in my model.

Additional voice and proactivity facilitators suggested by communication research include integrative win–win forms of conflict resolution (Franz and Jin, 1995), various trust-enhancing communicative behaviours (Kassing, 2002; Fairhurst, 2005), supportive climates fostering genuine dialogue (as reflected in the 'freedom of speech' concept; Haskins, 1996), factors such as inclusion and understanding from the Workforce Diversity Questionnaire (Larkey, 1996), the 'trialectics approach' emphasising the attractiveness of change efforts (Ford and Ford, 1995), and strong interpersonal relationships (Albrecht and Hall, 1991) characterised by relationship multiplexity (that is, multiple role links between communicators) and content multiplexity (that is, regular conversations about multiple topic areas).

Of particular importance is Eisenberg's (1984) concept of strategic ambiguity. In contrast to the widespread view that utmost clarity is always desirable, he argues that skilful equivocal communication, sometimes involving abstract or poetic language, may help achieve Kant's notion of maximum individuality within maximum unity, as it promotes change as well as unified diversity. Empirical research may explore how such an approach may be used by diversity managers and by minority employees who wish to ignite change from below.

Finally, an inspiring vision for voice and proactivity research would be to achieve an appreciation of Pearce's (1989) concept of cosmopolitan communication. In contrast to monocultural, ethnocentric and modernist forms of communication, which all centre around the coherence of the stories told by a majority, cosmopolitan communication reflects a commitment to find ways of achieving coordination without denying or depreciating other perspectives: 'Cosmopolitan communication enables communication among groups with different, even incommensurate, social realities' (p. 169). However, positivist–quantitative approaches are not amenable to some of the research steps proposed by Pearce (for example, learn to speak like a native in different groups; describe the interaction in terms of the resources of all participants in a system). As Pearce

noted, critical interpretative research attempts to ‘create the necessary conditions for improved communication among them’ (p. 171).

## CONCLUSION

In this chapter, I have developed a model of diversity, voice and proactivity incorporating individual, situational and group-level antecedents suggested by the psychological literature, including my own research, which highlights the importance of participatory, non-controlling and trust-enhancing managerial approaches. Subsequently, I discussed issues that need to be considered when tailoring the model to diversity dimensions such as gender, sexuality or nationality. Finally, I have suggested avenues for future research amenable to quantitative and qualitative research and discussed implications of communication concepts. I hope that this chapter represents a constructive form of voice useful for both psychologists and those from other disciplines. Ideally, diverse researchers from various social sciences should engage in forms of voice and proactivity that aim at achieving coordination, as in Pearce’s (1989) concept of cosmopolitan communication. Discussing the problems of refugees and asylum seekers, one of the most powerless groups in our world, French philosopher Jacques Derrida (2000, p. 23) noted: if an idea of cosmopolitanism has not yet arrived, ‘then, one has perhaps not yet recognised it’.

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## 16. Reactions to discrimination: exclusive identity of foreign workers in South Africa

**Kurt April and Amanda April**

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### EXTENDING THE DISCOURSE

This research is based on 243 interviews conducted in various workplaces and with a wide variety of individuals in modern-day South Africa. The research analysis unearthed a number of themes within the diversity discipline, however, for the purposes of this chapter we had to pick one theme for discussion. This chapter therefore focuses on the negative psychological effects which foreign employees experience in post-Apartheid and democratic South Africa.

The dominant diversity discourse has been concerned mainly from a political and policy standpoint (Liff, 1996; Dandeker and Mason, 2001). However, an evolving workplace discourse is emerging, informed by a critical post-structuralist tradition which challenges the static demographic characteristics of individuals and the positive, empowering view of individuals with different capacities – in fact, it has focused our attention on how diversity operates in organisations (Zanoni and Janssens, 2004), economic efficiency (Litvin, 2002), the nature of professions (ibid.) and broader institutional settings (de los Reyes, 2000). These discourses, it would appear, serve mainly to control less-powerful employees, such as immigrant and foreign workers, through focusing on fixed, essential group characteristics. Unfortunately, they overlook the material structure within which such discourse occurs, rendering the system static to ensuing changes in its environment.

Social systems are produced by people's interactions, and desirable social systems require more than self-organisation – in fact it requires all participants/system members to be aware and cognisant of the psychological processes dynamically grounding individual purposes, values and ultimately discretionary effort in the emerging social reality. Understanding this process requires clarifying the role of power and identity in the

transformation of collectives into social systems. The context of these research interviews, post-Apartheid South Africa, is significant, as resonances of the social discrimination and exclusion suffered by the Black and Coloured population, and women (Black and White), during Apartheid still remain, and is therefore one of the chief focus areas for transformation of the South African workplace. However, little to no attention is given to the impact and undesirable properties of South Africa's history, as well as current focus (stated above), on the psyche of foreign employees in the country.

From our research, we note that many South African organisations have, on the one hand, failed to create the necessary opportunities for individual/self and group reflection and, on the other, failed to increase flexibility and capacity in the system for appropriate action (emanating from such co-reflection). The necessary generative, recursive and inclusive psychological learning have therefore been lost to the organisation – as a result, it has rendered many organisational environments combative for foreign workers, and ultimately static from a sustainable competitive point of view. The consequences of such static environments are expressed in our interviewees' comments, as follows.

### **I Do Not Trust Anyone in Authority**

Anxiety distancing by the foreign employee towards the South African employer emerged as a major theme during these interviews. This involved the foreign employee physically and, more significantly, mentally distancing themselves from their employer for numerous reasons – especially when such distrust, in authority figures, has been exacerbated by previous (Apartheid) and recent unfair treatment of themselves, or others like themselves, that is, foreigners or immigrants ('I now avoid people or situations that make me feel uncomfortable'). Such wariness of certain authoritative or powerful individuals in the workplace logically resulted in foreign employees sometimes working anti-social hours ('I interact less and often try to do my work when no one is around, like early in the morning or after hours') in order to work in a lonely environment where they did not feel intimidated by the power imbalance. This arguably widened the gulf between managers and foreign employees, fortifying the manager's position as the 'authority figure' and legitimising the command-and-control relational hierarchy. One interviewee criticises the common South African practice of the 'superior telling the worker what to do and the worker obeying without question'. While it could be argued that maintaining distance from authority could at times be positive, by encouraging independence and the use of one's initiative at work, it also made

interviewees feel less comfortable in, and less attached to, the organisation – often resulting in (dysfunctional) communicative affects ('I have become extra careful during conversations at work'). In addition, it was clear that one bad experience with a South African colleague meant that foreign workers tended to expect the same from other South Africans, creating a long-term gulf of distrust and paranoia. One interviewee stated that a negative encounter 'pushes me away from having a close relationship with my colleagues. I start judging them. Today if I feel that someone has the same negative attitude of my first colleague I try to avoid that person'. Interviewees often spoke of negative experiences involving their feelings of inadequacy, and their consequent need to (over) prove their ability and worth to those higher up in the organisational structure. Distancing fuelled by anxiety and consequent resentment meant that many interviewees felt uncomfortable in the presence of top executives ('feeling on the spot to answer a question' and 'feeling as if I have to have an answer for everything, every time a senior person questions me'). Many of those interviewed complained of persistent questioning by the management as to their progress, causing them to feel distrusted and doubt their own capabilities to fulfil their job requirements.

### **I Am Not Treated as a Human Being in the Workplace**

Anxiety distancing relates to the dehumanisation of employees in the workplace. Many interviewees felt that the language barrier and cultural difference meant that they were not regarded as individuals but company workers, with set tasks to fulfil (there was much emphasis on a 'production line' mentality). Such instrumentalism was enhanced by the transactional relationships with South Africans, as they did not enquire or appear interested in communicating about the history and culture of the foreign workers – in fact, some interviewees claimed that this was only the case for foreigners from other African countries, as South Africans appeared extremely interested in all things European. While such de-individualisation is clearly negative, interestingly some individuals felt that it was a small price to pay to avoid the discrimination they felt they would have suffered if their individuality was focused upon by managers and employers. It was therefore more 'effective, [to] not be noticed' than being 'the special case, that always needs considering and for whom allocations had to be made'. One female employee consequently stated that 'I find it easy being in a foreign country where I have anonymity'. This perceived benefit, however, did not prevent the majority of foreign employees in this situation from feeling undervalued in the workplace, due to them being overmanaged (because of perceived risk), their individuality being

stifled and their identity being undesirable as opposed to celebrated. A male interviewee stated that 'the lack of respect in my work environment resulted in me not actively contributing to the work environment, and feeling psychologically disconnected'. While this led to a lack of motivation and isolation from his work and his workplace due to resentment, in many cases feeling undervalued contributed to employees doubting their own self-worth and ability. It was often stated by interviewed foreign employees that their company's cold, goal-orientated approach made them feel 'insignificant, used and inconvenient . . . a token, as if I don't have a brain'. This was often intensified by the lack of voice, by and on behalf of foreign workers, and support that new foreign employees receive from the management and coworkers when they entered their jobs. New careers became riddled with insecurities due to employees remaining uninformed about the nature of their company and employment duties, and their lack of social mixing outside of the workplace – thus, leaving the foreigners ignorant and sceptical of South African values and identity. One interviewee mentioned how he was forced to organise his own initiation into his new company due to a lack of structural support: 'For two weeks I was on my own and miserable until I approached one of them, whom he helped [by] sharing the necessary information for my new job'.

### **People at Work Are Not Genuinely Interested in My, or Local, Success**

The lack of nurturing of, and support for, employees can be partly attributed to the attitude of certain contemporary companies, particularly those involved in manufacturing and production (a growing sector in the booming South African economy). As such jobs tend to require few qualifications and wages are relatively low, foreign interviewees stressed that companies regarded their workers as dispensable ('take it or leave it and somebody else will fill your shoes') and as cogs in a machine which could be overutilised without having to invest in them. As companies of this nature are mainly concerned with the development of previously disadvantaged South Africans and with the short-term performance of the company, they are generally uninterested in investing in their long-term social capital, heterogeneous innovation and social cohesiveness of South African and foreign workers which would be necessary to sustain the future competitive advantage of the company. The arguably narrow focus of affirmative action programmes within the workplace simply exacerbates the situation, with many employers embracing diversity because it improves their local image and not necessarily because they feel it is morally right or necessary for competitive sustainability. Thus, foreign employees especially are often made to feel as if they should be grateful when they receive certain

jobs, meaning that they subsequently feel undervalued as individuals. A female employee spoke of how she had been made to feel unworthy of her new post: 'My manager would see me as an empowered person [affirmative action employee] who has been done a favour by being given a position. He would see me as one of the people adding to his statistics of balanced race and gender'.

The aforementioned dehumanisation of employees and the consequent questioning of their self-worth/ability relate to their disempowerment on entry into a new work environment or throughout their time at a company. Feelings of one's inadequacy or one's rightful place in a hierarchical organisation often, as our interviewees report, led to deference due to anxiety or individual expectation. The paternalistic, Christian-National dominant mode of leading by senior managers and executives in South Africa carries with it a number of assumptions: senior managers and executives are like 'fathers to the organisation, while workers are, and should behave as children', 'leaders are in the know and have the solutions, and followers should act without question', 'education means that one is more of a human than those who are not . . . and therefore entitled to more', 'anything and anyone from Europe carries more weight and credibility', and 'younger people should be seen and not heard'. One interviewee talked of 'swallowing pride and keeping quiet in an attempt to divert attention or diffuse the moment. This is behaviour that younger employees are often expected to exhibit as a matter of course'. The fulfilment of such expectations contrary to one's wishes commonly resulted in a victimisation mentality (almost an externalisation of one's locus of control), where employees felt that speaking up and being assertive when it was expected or required would expose them to discrimination in the workplace – ultimately leading to a form of learned helplessness and unwillingness to take responsibility. Employees suffered from victimisation in numerous forms, of which condescension was prevalent ('He criticised me for mispronouncing "pronunciation"'). Therefore, individuals would often avoid doing what came naturally to protect themselves from victimisation.

### **I Tried to be More Like Them, Which I Wasn't**

Feeling victimised was indeed more common among foreign female interviewees, as their gender was often perceived as more vulnerable and less capable by their male counterparts, and within the male-engendered South African workplace. During Apartheid (and still currently in many organisations), women had to contend with, not only racial, xenophobic, ageist and disability-related prejudices but also discrimination due to gender. As a consequence, many felt excluded and marginalised in the workplace.

Many foreign female interviewees spoke of feeling unimportant in decision making as they were rarely consulted, and felt that real decision making was actually taking place in other environments (for example, in sporting environments, in social gatherings at home, in gentlemen's clubs and so on) that they were not privy to and then 'rubber-stamped in the workplace'. One interviewee stated: 'In a group with only men, nobody says something to me. I think it may be caused by the fact that I am a woman'.

Another form of reported victimisation was that felt and experienced by gay and lesbian foreigners, often referring to being gay and/or lesbian in conjunction with being a foreigner as a 'double whammy' (double disadvantage). As such, gay and lesbian employees are 'tolerated', at best, as a result of the progressive social policies and laws in South Africa but ultimately, as one interviewee put it, 'considered to be problematic to the normal functioning of society'. Derogatory, humiliating and abusive terms (which were said to, or about, them) were quoted to us by foreign interviewees, and it seems that a collective consciousness exists within the South African workplace that makes it acceptable to treat people in ways that are akin to treating them as objects and as animals – often likened to the names that they were, and are, called.

Furthermore, cognitive constraints resulting from intercultural misunderstanding interferes with workplace relations. One key dimension of such misunderstanding and feelings of exclusion emanates from language and its subsequent communicative outcomes. It sometimes was the case, in the experience of our interviewees, that what was offensive in their culture, was normal in the South African culture. One man spoke of how these different social values meant that 'even something so simple like some of the content of his South African jokes seemed to offend most of his foreign workmates'. Some of our foreign interviewees referred to their unhappiness with regard to feeling victimised as a result of their suspicion that South African colleagues were discussing them in a language they could not understand. A female interviewee stated that she thought 'people excluded me as they talked Zulu or Afrikaans. I felt they were talking about me, specifically when they spoke Zulu. You cannot pick up the tone of Zulu. In Afrikaans you could'. Another stated: 'I couldn't understand the jokes and banter, because I didn't understand the context they were made in. This made it difficult to join in'. If new foreign employees are not helped/trained to understand the language and thus bridge the cultural gap, the necessary social mixing will, at best, remain superficial and inauthentic.

Many interviewees found it very difficult to adjust their behaviour to fit with the culture of their South African company without losing much of their individuality. While many attempted to do both ('I tried basically to learn as much as I could about the culture, behaviours, way of doing



things, mentality of the people, without ever losing my identity'), the majority encountered clashes of culture which forced them to choose one approach in their workplace. One individual explained to us that he had lost all connection to his 'core' (in other words, he could no longer be true to himself), due to his constant individual adjusting of 'my modes of interaction to allow me the opportunity to build relationships and be acceptable to my colleagues . . . which ultimately means, to be more like them'. At worst, however, in a harsh and unaccepting work environment, a lack of knowledge regarding cultural nuances can lead to misunderstandings and discrimination.

### **I Learned that You Can Use Your 'Being Different' in a Way that Works for You**

While there has been much discussion regarding the negative aspects of being 'different' in the South African workplace, there has been relatively little on the positive elements. A number of foreign interviewees perceived being different in the workplace as beneficial to them, furthering their career opportunities, enabling them to provide fresh perspectives on issues and making them strive harder to prove themselves. One foreign man claimed: 'My different perspectives and ways of doing things has already led to two major innovations in my company . . . they are now seeing my value as far as creativity is concerned'. Many females spoke of the way in which they used their femininity as a strength in the workplace, as the males they worked with did not expect them to be talented. Female interviewees also turned the negative aspects of being a woman, in a male-dominated workplace, into an advantage, by working harder than men to prove themselves and thriving in their companies as a consequence – often leading to managers giving them more discretion over their work and ultimately resulting in faster promotions. In addition, females often used their different (from men) ways of working to provide their companies (which need different approaches in the 21st century) with different qualities and approaches. One interviewee stated: 'My subordinates and team mates and I often approach things from different viewpoints which I feel gives me the edge . . . as a woman I am more customer focused'.

## **DEMOGRAPHY AND COMMUNICATIVE NETWORKS**

When followers and leaders are from different cultural groups, such as foreign workers in South African organisations, ethnicity may become a

salient demographic characteristic that can influence their relationship. Tsui et al. (1992) found that an individual's attachment to the organisation is lower when there is a difference in race between an individual and the other members in a workgroup. This attachment factor is further negatively affected if the race is structured hierarchically within the organisation, that is, in our South African case where most managers are White and most foreign workers are people of colour. Wesolowski and Mossholder (1997) found that subordinates in leader–follower dyads that were racially diverse had lower job satisfaction when compared to homogeneous dyads. Our research has shown that ethnicity differences may be demographically and psychologically salient for those followers who identify strongly with South African cultural values. Furthermore, demographic similarities such as the same real or perceived root ethnicity (for instance, White foreign workers from Europe working for White South African managers) may result in in-group categorisation and preference/favouritism.

Some writers argue that convergence around collective identity leads to action by increasing organisational commitment (Ashforth and Mael, 1989; Dutton et al., 1994) and strengthening organisational culture, motivating employees to work cooperatively (Schein, 1986; Saffold, 1988; Fiol, 1991). More recent work, however, highlights the importance of tensions, fluidity, and paradox in organisational identity (Gioia et al., 2000; Pratt and Foreman, 2000; Fiol, 2002). We adopt a discursive perspective, which is fundamentally more interested in the tensions and fluidity associated with collective identity. From a discursive perspective, a collective identity exists as a discursive object produced in and through the politicality of conversations, rather than as a solely cognitively-held belief – resulting in differential resource allocation, differential motivation and legitimisation with respect to inclusion and exclusion in collaboration, and differential distribution of advantage. Conversations, in this view, are partially the product of strategic individual action and power (re)negotiation.

South African organisational history was created because organisational protagonists, more specifically the economically dominant White group, selectively used available vocabulary from their memory- and developed symbolic-reservoir to interpret, reflect on, legitimise and act on their stories about self and others over time. These stories about 'the women', 'bitches' (referring to women), 'chicks/girls' (referring to grown women), 'the weak' (referring to women), 'the Blacks', 'the *swart gewaar*' (referring to the perceived Black threat), 'the coons' (referring to the Coloureds), 'the laughing drunkards' (referring to the Coloureds), 'the koolies' (referring to the Indians), 'the curry munchers' (referring to the Indians), 'the moffies'

(referring to gays and lesbians), 'the uneducated' (referring to all considered Black, and women), 'the unskilled' (referring to all considered Black, and women), and the like, often served the dominant political, societal and economic paradigms of Apartheid, for some still in the present, and serves the possible future interests of particular individuals. Therefore, for foreigners who are also women, Black, mixed race and Asian, it would be particularly difficult to maintain their root identity, without becoming targets of conversational abuse (overt and covert) as well as suffer isolation as a result of their explicit difference.

Relational demography theory which postulates that people compare their demographic features to other people in their social groups to judge whether the group's demographic features are similar to their own demographic features, we believe, provides a framework for understanding the ethnically, culturally and regionally diverse groups found in South African organisations. Tsui et al. (1992) and Riordan and Shore (1997) have shown that the level of similarity between foreign workers and locals affects attitudes and behaviours related to both their job and their co-workers – specifically that demographic similarity leads to attitudes such as commitment to the group, group cohesiveness, and high group evaluations. These similarities can help validate their personal values and beliefs and enhance their self-esteem (Zimbardo, 1994). Tajfel (1982) showed that, in forming their identity, people desire to be associated with groups that build their self-esteem, and Turner (1981) postulated that individuals use social and personal characteristics such as race, age, gender, regional origin, or organisational membership to create their self-identity and define their own groups. Thus, based on our interviewee responses, we can claim that the South African workplace is more accepting of and less psychologically damaging to foreign workers of European descent (as they are closer to the dominant senior management and executive class in South Africa, that is, White English- and Afrikaner men) as opposed to foreign workers from other regions, especially Africa.

Informal networks, the need to fit into the dominant economic group and conversational metaphors emerged as clear factors limiting the realisation of inclusion in the workplace. The restricted access to, or exclusion from, informal interaction networks (Harriman, 1996; Wajcman, 1999) for foreigners, meant that the construction of narratives about 'others', through power-differentiated jokes and comments seemed, and still seems, 'normal'. Similarly, even though South Africa has some of the most modern laws on gay and lesbian issues, much of organisational life still reveres the traditional, heterogeneous relationship – which emanates from a stance of superiority or belief in a moral high ground. The heteronormative nature of the dominant economic South African group, that is,

the majority of executives and leaders, casts homosexuality in a deviant light and makes conversations about same-sex desire, and behaviour towards same-sex individuals undesirable. Connell (1987: 183) notes that 'hegemonic masculinity is always constructed in relation to other subordinated masculinities, as well as in relation to women', and must negate other masculinities, women and other groups posing a threat to stable and self-sufficient notions of self-hood (Kristeva, 1982). The construction of language, and therefore the 'credible' mental models so prevalent with the dominant economic group legitimised, and still legitimises, the subjugation of economic- and social-minority foreigners (and doubly so for foreign gays and lesbians).

The value of such disempowered ('outgroups') or powerful ('ingroups') informal networks is found in how closely tied they are to the allocation of instrumental resources (Sheridan and O'Sullivan, 2003) that are critical for effective performance in a job and for career development, as well as the express benefits of friendships and social support (Ibarra, 1993). Not having access to powerful informal networks disadvantages individuals in terms of not being privy to all of the information about what is going on in the organisation, not having connections to help with mentoring and introductions necessary for career development (especially at higher levels within an organisation), and being on the 'short end of the stick' with respect to one's personal, and one's identity group's, organisational narrative. Only recently have researchers (O'Connor, 2004; Martens et al., 2007) explicitly recognised the role of stories, narratives and storytelling, and its accompanying gender bias (Cannings and Montmarquette, 1991), with respect to resource acquisition (dominant narrative actors often have asymmetrical access to organisationally relevant information), access to economic opportunities, and identity affirmation to the broader contextual narratives (thereby reducing the perceived uncertainty and risk in being genuine).

Kim (1991) asserts that communication competence is composed of cognitive, affective and operational levels. At the cognitive level, the individual needs to have competence in the language and knowledge of the host culture. At the affective level, competence consists of emotional capacity to deal with the challenges of a host culture and to understand the hosts' emotions and aesthetic values. The operational competence involves behavioural competence in which an individual is able to select appropriate communication strategies to interact with the host country successfully. From this we can see that high-level competence involves all-round knowledge which goes beyond general cultural patterns and skills. In other words, cultural generalisations alone will be far from sufficient to provide adequate skills for intercultural encounters.

## CONCLUSION

To conclude, we claim that the psychological effects of workplace discrimination in the South African workplace on the foreign worker, especially the African foreign worker (who now makes up the largest foreign worker group in the country) are often overlooked. While companies often discriminate against employees for being different – directly and indirectly – employees unfortunately often exacerbate their exclusion as a consequence. This can be attributed to feeling distrusted, overlooked and undervalued by those in authority and their coworkers. Such negative feelings naturally lead to a loss of confidence and power in the workplace, causing foreigners to further distance and isolate themselves from authority. The lack of support structures for such employees, and the static workplace culture of many South African workplaces, mean that those new to companies and organisations fail to understand or become incorporated into what should be a dynamic, growing and mobile culture. This, at first, leads to psychological manoeuvring on the part of the foreigners.

One of the most important challenges facing modern South Africa, and at the same time one of our most significant opportunities, is the increase in ethnic and social heterogeneity. While there have been positive instances where being different in one's workplace has proved advantageous, it is clear that structures and discourses within South African organisations need to change, with management altering a top-down approach to one which is consultative, inclusive and communicative with all levels and forms of foreign diversity within the organisation. Not in the short term, but in the medium to long run, successful immigrant societies in South Africa can help create new forms of social solidarity and dampen the initial negative effects of diversity by constructing new, more-encompassing identities – a broader sense of 'we'. In other words, we are arguing for an extension of Jürgen Habermas's theory of communicative interaction through the inclusion of requisite variety and identity dynamism, offered by the introduction of foreign workers and immigrants in the South African workplace.

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# 17. Sex differences in coping with work–home interference

**T. Alexandra Beauregard**

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## INTRODUCTION

The trend towards longer working hours for much of the labour force in the UK, along with escalating numbers of dual-income families and employed single parents, creates increasing opportunities for multiple roles to clash with one another. Interference between work and home occurs when participation in one role is made more difficult by virtue of participation in the other (Greenhaus and Beutell, 1985). Research has established the utility of differentiating between work interference with home (WIH), and home interference with work (HIW) (Kelloway et al., 1999). Both directions of interference can produce a number of negative outcomes. Employees experiencing work–home interference have been found to exhibit lower levels of organizational commitment and job performance, and greater anxiety, depression, absenteeism and intention to turnover (see Eby et al., 2005).

Given the costs of work–home interference for both organizations and individuals, the importance of coping strategies is considerable. While there is a growing literature on the impact of organization-implemented practices designed to reduce work–home interference, little attention has been paid to individual coping mechanisms. For employees of organizations that do not offer work–home practices, or who lack access to available practices, individual coping is of paramount significance.

This chapter seeks to extend existing research on work–home coping in several ways. First, it investigates the effects on interference of a wider range of coping strategies than those previously addressed in the work–home literature. Second, it takes into account both directions of work–home interference. Finally, this study examines the effect of sex on the effectiveness of coping mechanisms, as dissimilar expectations of men and women in the workplace and at home may influence the ability of certain strategies to reduce work–home interference.



## COPING METHODS

Using Lazarus and Folkman's (1984) cognitive model of general coping, coping in the work–home context can be seen as a response designed to eliminate the threat of work–home interference perceived during primary appraisal of stressors. Despite criticism (see Skinner et al., 2003), the most commonly used higher-order categories of coping remain *problem focused*, aimed at changing the situation causing stress, and *emotion focused*, aimed at changing the emotional consequences of stress (Lazarus and Folkman, 1984). A review of the work–home coping literature identifies two recurring elements of problem-focused coping (role redefinition and instrumental social support), and three key types of emotion-focused coping (emotional social support, behavioural disengagement, and cognitive reappraisal). Apart from social support, investigation of these strategies in the work–home context has been exclusively qualitative in nature.

According to the socialization hypothesis (Ptacek et al., 1992), women are socialized to use more 'feminine', emotion-focused coping strategies, while men are socialized to use more practical, problem-focused coping techniques. However, a perspective based on the gendered nature of the work–home interface (with men's primary domain traditionally seen as work, and women held primarily responsible for the home) suggests that differences in choice and effectiveness of coping strategies may be attributable to different expectations of men and women. This perspective will be explored in this chapter.

### **Problem-focused Coping**

Amatea and Fong-Beyette (1987) described role redefinition as modifying either the demands of a role or the methods for performing the role. According to Elman and Gilbert (1984), structural role redefinition characteristically involves negotiations with others as a means of altering structurally given demands. Two distinct elements of this strategy emerge: reducing involvement in role activities, and adapting schedules in one domain to accommodate the demands of another:

- *Limiting work role involvement* Becker and Moen (1999) identified 'placing limits on work' as a strategy for dual-earner couples dealing with interrole conflict. Establishing limits on work-related responsibilities taken on, hours spent at work, and work brought home clearly has the potential to reduce the spillover of work demands into the home domain, lessening WIH. Conceding to the demands

of home or family in this fashion may, however, increase perceptions of HIW.

- *Scheduling work to accommodate home* In their interview-based research on the prevalence of restructuring work for family, Karambayya and Reilly (1992) identified behaviours such as making special arrangements at work to attend a child's activity, or restructuring work hours in order to be at home at certain times. These behaviours are likely to reduce the degree of WIH, but the shaping of the work domain to accommodate the needs of the home domain effectively constitute HIW.
- *Limiting home role involvement* Cutting back on non-essential family or social activities has obvious potential for decreasing interference from home to work, but may increase levels of WIH if perceived as a concession to the demands of the workplace.
- *Scheduling home to accommodate work* The effect of this strategy is likely to be the opposite of scheduling work to accommodate home. HIW is likely to be diminished, but WIH may increase as a result of work demands taking precedence over family or social activities.

Traditional gender role expectations may render use of these strategies dissimilarly effective for men and women. In contrast to women, men are more often penalized in terms of arrested career development for not complying with work role expectations and for efforts to accommodate family responsibilities (Powell, 1997). Men who curtail their involvement at work, or who structure their job duties to facilitate fulfilment of demands at home, are more likely to have any consequent decline in WIH cancelled out by reduced opportunities for promotion or pressure from colleagues and superiors to assign greater priority to work, both of which contribute to WIH (Cooke and Rousseau, 1984). Because men are expected to prioritize work over home, making concessions at work for personal responsibilities may result in greater perceptions of HIW for them than for women, who are expected to make home a priority.

*Hypothesis 1: Limiting work role involvement and scheduling work to accommodate home will be associated with lower levels of WIH for women than for men, and higher levels of HIW for men than for women.*

Women have traditionally experienced stronger social sanctions than men for noncompliance with family demands (Greenhaus and Beutell, 1985). If women are expected to make home their primary domain, restructuring personal or family activities to accommodate job demands may result in greater perceptions of WIH for them than for men, who are expected to

prioritize work over home and are rewarded by their employers for doing so. Women who limit their involvement at home or who schedule family activities to accommodate work demands may also find any reduction of HIW offset by social condemnation of their priorities, whereas men are unlikely to experience comparable penalties.

*Hypothesis 2: Limiting home role involvement and scheduling home to accommodate work will be associated with higher levels of WIH for women than for men, and lower levels of HIW for men than for women.*

### **Social Support**

Instrumental social support refers to practical assistance or information derived from friends, family, or colleagues, while emotional social support consists of understanding or reassurance provided by others. Research indicates that women enjoy larger social support networks than do men (Lee and Duxbury, 1998), and the general coping literature suggests that women may make greater use of social contacts to help them manage role demands and consequent stress (Porter et al., 2000). It is therefore likely that these strategies will prove more effective in reducing work–home interference for women than it will for men.

*Hypothesis 3: Social support will be associated with lower levels of WIH and HIW for women than for men.*

### **Emotion-focused Coping**

- *Behavioural disengagement* This strategy involves reducing efforts to deal with stressors, and is generally regarded as being dysfunctional (Carver et al., 1989). While the gender role perspective does not suggest any differences between men and women in the effectiveness of this strategy, any individuals who abandon attempts to manage their work–home interference are likely to report higher levels of both WIH and HIW.
- *Cognitive reappraisal* Individuals employing this strategy make conscious attempts to alter their attitudes about themselves, their behaviours, or their situation, by modifying the cognitive meaning of these events or efforts rather than changing the situation itself (Amatea and Fong-Beyette, 1987). As with behavioural disengagement, there are no immediate implications for sex differences in the effectiveness of this strategy arising from the gender role framework. Reappraising work–home interference in a positive manner may

lead to reduced perceptions of both types of interference for both men and women, as favourable elements of the situation are given emphasis and acquire greater salience for respondents.

*Hypothesis 4: Behavioural disengagement will be positively related to WIH and HIW for both men and women, while cognitive reappraisal will be negatively related to WIH and HIW for both men and women.*

## METHOD

Participants in this study were drawn from two organizations in England: a local authority in the south, and a higher-education institution in the north. Surveys were mailed out to all employees; 226 usable surveys were returned, yielding a response rate of 29 per cent.

The majority of respondents were women (62.3 per cent). Participant ages ranged from 17 to 68, with an average age of just over 41 years. Just under 80 per cent of respondents reported living with a spouse or partner, and of these, 82.8 per cent were members of dual-earner households, where the spouse or partner was also employed. One hundred and forty-one (63.2 per cent) respondents reported having children, with the average age of the youngest child just over 14 years, and 14.8 per cent of respondents reported having caregiving responsibilities for adult dependants (other than children).

## MEASURES

All scales were answered with a seven-point Likert scale ranging from ‘strongly disagree’ = 1 to ‘strongly agree’ = 7 for each item.

- *Work interference with home* was measured using the 6 items from the time- and strain-based work-to-family conflict subscales of Carlson et al.’s (2000) multidimensional measure of work–family conflict. The statements were modified in order to be applicable to respondents both with and without family responsibilities. The reliability alpha for this scale was  $\alpha = 0.92$ .
- *Home interference with work* was measured using the 6 items from the time- and strain-based family-to-work conflict subscales of Carlson et al.’s (2000) measure of work–family conflict. Again, items were modified in order to be applicable to all respondents. Cronbach’s alpha for this scale was  $\alpha = 0.84$ .

Because the measurement of work–home interference coping strategies is not highly developed, and there is no single preferred instrument (Koeske et al., 1993), new scales were created to measure individual coping mechanisms. Complete factor loadings for each scale can be found in Table 17.1.

- *Limiting work-role involvement* was measured with four items based on Karambayya and Reilly's (1992) open-ended measure of work restructuring, and on the behavioural correlates of the 'placing limits' strategy identified by Becker and Moen (1999). Items assessed the extent to which respondents limited their involvement in non-essential activities at work in an effort to reduce interference between work and home (for example, 'I try not to take on additional responsibilities at work'). Cronbach's alpha for this scale was  $\alpha = 0.77$ .
- *Scheduling work to accommodate home* was measured with four items based on Karambayya and Reilly's (1992) measure of work restructuring. Items assessed the extent to which respondents scheduled their work activities to accommodate demands from home (for example, 'I try to arrange my work hours to fit around personal activities or my family's schedule'). The reliability alpha for this scale was  $\alpha = 0.86$ .
- *Limiting home role involvement* was measured using three items created for this survey, assessing the extent to which respondents limited their involvement in non-essential activities at home or in their personal lives (for example, 'I try to restrict the number of social or leisure activities I participate in'). Cronbach's alpha for this scale was  $\alpha = 0.81$ .
- *Scheduling home to accommodate work* was measured with three items created for this survey, assessing the extent to which respondents scheduled their activities at home to accommodate demands from work (for example, 'I try to arrange my personal or family activities to fit around my work schedule'). Cronbach's alpha for this scale was  $\alpha = 0.91$ .
- *Social support* Instrumental social support was measured with four items adapted from items in the 'Seeking social support for instrumental reasons' subscale of Carver et al.'s (1989) COPE inventory. Items assessed the extent to which respondents sought information or assistance to help them cope with competing demands from work and home (for example, 'I talk to someone to find out more information about what can be done to improve my situation').

Emotional social support was measured using three items adapted from items in the ‘Seeking social support for emotional reasons’ subscale of Carver et al.’s COPE inventory. Items assessed the extent to which respondents sought empathy or a listening ear from friends and family as a means of coping with competing demands from work and home (for example, ‘I discuss my feelings with someone who provides sympathy and understanding’). Factor analysis revealed that all seven social support items loaded on the same factor. The two subscales were therefore combined to form a composite scale labelled ‘Social support’. Cronbach’s alpha for this scale was  $\alpha = 0.89$ .

- *Behavioural disengagement* was measured using three items adapted from those in Carver et al.’s COPE inventory. Items assessed the extent to which respondents had abandoned attempts to achieve work–life balance (for example, ‘I give up the attempt to achieve balance between work and my personal life’). The reliability alpha was  $\alpha = 0.81$ .
- *Cognitive reappraisal* was measured with three items adapted from those in the ‘Positive reinterpretation and growth’ subscale of Carver et al.’s COPE inventory. Items assessed the extent to which respondents emphasized the positive aspects of dealing with competing demands from work and home (for example, ‘I try to look upon the experience as a learning opportunity’). The reliability alpha for this scale was  $\alpha = 0.83$ .

## ANALYSIS

*T*-tests were conducted to explore gender differences in coping strategy use. Hierarchical multiple regression analysis was used to test the impact of sex and coping strategies on WIH and HIW.

In each of the regression equations, several background variables were included in the analyses for control purposes. These were hours worked weekly, presence of children aged 16 and under in the respondent’s household (absent = 0/present = 1, dummy-coded), and current use of organizational work–home practices (no use = 0, use = 1, dummy-coded). This latter variable was included so that the effects of individual coping beyond those of organizationally assisted coping could be determined. The local authority offered five flexible work practices, while the higher-education institution provided only limited access to an on-site childcare facility.

## RESULTS

The intercorrelations are presented in Table 17.1, with the means, standard deviations, and t-tests in Table 17.2. The results of the multiple regression analyses are shown in Table 17.3, with the significant interactions presented in Figures 17.1 and 17.2. Hypothesis 1 was partially supported, with a significant interaction found between sex and limiting work role involvement ( $\beta = -0.15, p < 0.05$ ) for WIH. Hypothesis 2 predicted that limiting home role involvement and scheduling home to accommodate work would be associated with higher levels of WIH for women than for men. A significant interaction between sex and scheduling home for work was found, but the relationship was in the opposite direction than that predicted; use of this coping strategy was associated with higher levels of WIH for men ( $\beta = -0.13, p < 0.05$ ), rather than women.

No support was found for Hypothesis 3. Hypothesis 4, however, was fully supported. Behavioural disengagement was positively and significantly related to WIH ( $\beta = 0.20, p < 0.001$ ) and HIW ( $\beta = 0.15, p < 0.05$ ), and cognitive reappraisal was negatively and significantly related to WIH ( $\beta = -0.16, p < 0.05$ ) and HIW ( $\beta = -0.16, p < 0.05$ ).

## DISCUSSION

This chapter sought to achieve two aims: (i) to investigate the effects of a range of coping strategies on work–home interference, and (ii), to examine the effect of sex on the effectiveness of these strategies. In terms of the general efficacy of coping techniques, cognitive reappraisal of the situation appeared to be the only successful interference-reduction strategy for all employees. Behavioural disengagement, or ‘giving up’, emerged as an ineffective coping strategy, being positively associated with both types of work–home interference. Positive thinking can evidently decrease perceptions of demands from one domain spilling over into another, but abandoning all attempts to achieve balance between work and home has uniformly detrimental consequences.

### **Use of Strategies**

The most popular coping technique for the respondents in this study was cognitive reappraisal, a strategy in which the responsibility for reducing work–home interference remains with the individual. Strategies that required employing the assistance of others to redefine roles and redistribute demands (limiting role involvement, scheduling one domain

Table 17.1 Intercorrelations among work-home interference and coping variables

Variable	1	2	3	4	5	6	7	8	9	10	11	12
1. Work interference with home	(0.92)											
2. Home interference with work	0.02	(0.84)										
3. Sex	0.16	0.11	-									
4. Hours worked	0.41*	-0.26	-0.30	-								
5. Presence of children	0.23	0.10	-0.27	0.01	-							
6. Limiting work role involvement	0.02	0.11	-0.02	-0.05	-0.05	(0.77)						
7. Scheduling work for home	-0.33	0.34	0.07	-0.50**	0.04	0.14	(0.86)					
8. Limiting home role involvement	0.19	0.18	0.02	0.28	0.05	0.11	0.20	(0.81)				
9. Scheduling home for work	0.45**	0.23	-0.18	0.30	-0.11	0.26	0.14	0.52**	(0.91)			
10. Social support	-0.10	0.03	0.07	0.16	0.11	-0.11	0.15	-0.09	0.04	(0.89)		
11. Cognitive reappraisal	-0.11	-0.04	0.00	0.06	-0.03	-0.17	0.26	0.02	0.10	0.39*	(0.83)	
12. Behavioural disengagement	0.05	0.13	-0.10	0.05	0.18	-0.06	0.09	-0.01	-0.02	-0.18	-0.22	(0.81)

Notes:

$N = 226$ .

Scale reliabilities are in parentheses.

\* $p < 0.05$ ;

\*\* $p < 0.01$ .



*Table 17.2 Differences in use of coping techniques between men and women*

Measure	Men ( <i>n</i> = 85)		Women ( <i>n</i> = 141)		<i>t</i> (224)
	M	SD	M	SD	
Work interference with home	4.25	1.58	3.84	1.65	1.85 <sup>†</sup>
Home interference with work	2.22	1.00	2.20	1.00	0.10
Hours worked weekly	41.27	6.46	36.69	10.23	4.10***
Limiting work role involvement	4.30	1.38	4.22	1.21	0.40
Scheduling work for home	4.20	1.41	4.29	1.45	-0.45
Limiting home role involvement	3.40	1.44	3.72	1.39	-1.64
Scheduling home for work	4.06	1.79	4.39	1.46	-1.44
Social support	4.15	1.27	4.52	1.08	-2.21*
Cognitive reappraisal	5.12	1.20	5.24	0.98	-0.81
Behavioural disengagement	3.29	1.46	3.21	1.37	0.41

Note: *N* = 226. <sup>†</sup>*p* < 0.10; \**p* < 0.05; \*\*\**p* < 0.001.

to accommodate the other, and enlisting social support) proved less popular.

Similar findings were obtained twenty years ago by Elman and Gilbert (1984), indicating that despite the mounting awareness of 'work-life balance' within the past two decades, both men and women remain reluctant to seek structural change in the workplace. The use of non-standard work arrangements, such as flexible hours or working from home, often renders employees less visible at work. Because time spent at work is often used as an indicator of employee commitment and productivity, these arrangements have been associated with career penalties such as lower performance evaluations, smaller wage increases, or fewer promotions (Raabe, 1996). It is therefore unsurprising that the participants in the current study chose to focus on coping strategies with fewer potential negative career repercussions.

A similar reluctance to restructure the home or family role among respondents of this research, the majority of them caregivers to either children or adult dependants, may indicate their desire or sense of obligation to fulfil the demands of this role themselves rather than delegating, sharing, or otherwise reducing their responsibilities. Conversely, the preponderance of respondents belonging to dual-earner households suggests that resources for restructuring home demands may be limited. Opportunities to devolve responsibilities to others may not present themselves readily, resulting in reliance upon more individual means of coping with competing demands from work and home.

Table 17.3 Hierarchical regression analyses predicting work-home interference

Independent variable	Work interference with home			Home interference with work		
	Step 1	Step 2	Step 3	Step 1	Step 2	Step 3
Hours worked weekly	0.44***	0.33***	0.34***	-0.06	-0.03	-0.04
Presence of young children	0.16*	0.09	0.08	0.12†	0.05	0.05
Current use of work-home options	-0.01	0.01	0.01	0.09	0.03	0.03
Gender	0.00	-0.05	-0.05	-0.04	-0.04	-0.04
Limiting work role involvement		-0.03	-0.05		0.04	0.02
Scheduling work for home		-0.07	-0.06		0.27***	0.27***
Limiting home role involvement		0.18**	0.20**		0.12	0.12
Scheduling home for work		0.18**	0.15*		0.00	0.01
Social support		-0.04	-0.02		0.07	0.08
Cognitive reappraisal		-0.13*	-0.16*		-0.16*	-0.16*
Behavioural disengagement		0.21***	0.20***		0.15*	0.15*
Gender × Limiting work role involvement			-0.15*			-0.05
Gender × Scheduling work for home			0.06			-0.03
Gender × Limiting home role involvement			0.12†			0.07
Gender × Scheduling home for work			-0.13*			-0.01
Gender × Social support			-0.06			0.02
<i>F</i>	13.83***	12.69***	9.74***	1.72	4.18***	2.93***
$\Delta F$	13.83***	9.78***	2.33*	1.72	5.45***	0.32
$\Delta R^2$	0.21***	0.20***	0.03*	0.03	0.15***	0.01
Adjusted <i>R</i> <sup>2</sup>	0.19***	0.37***	0.39***	0.01	0.14***	0.12

Note: *N* = 226. †  $p < 0.10$ ; \*  $p < 0.05$ ; \*\*  $p < 0.01$ ; \*\*\*  $p < 0.001$ .

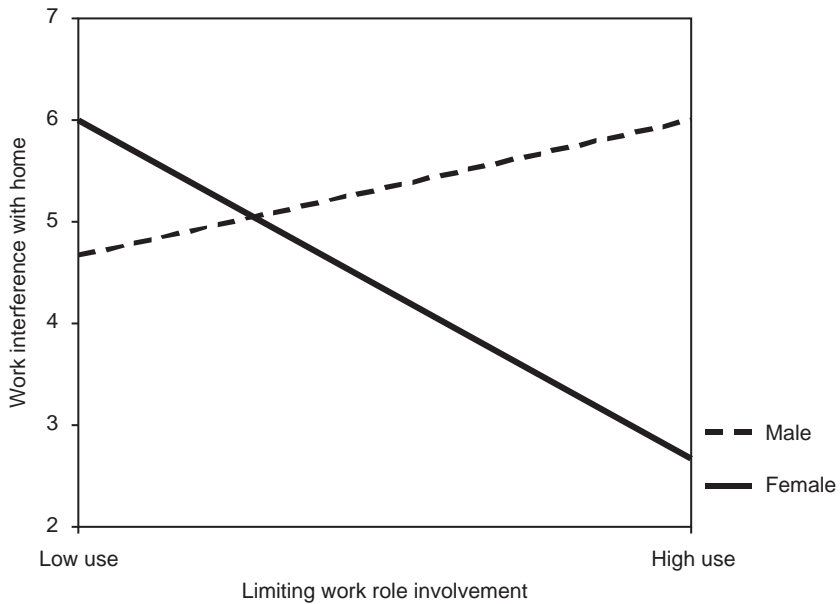


Figure 17.1 Sex  $\times$  limiting work role involvement predicting work interference with home

### Sex Differences in Effectiveness of Strategies

Limiting work-role involvement was associated with lower WIH for women only. Women are still expected to be the primary caretakers of the home, and as such, it may be more socially acceptable for them to limit their involvement or responsibilities at work, their 'secondary' domain. Men, in contrast, are still expected to make work a priority (Wiley, 1991). Limiting or reducing involvement at work would be likely to result in organizational penalties for men, which might offset any benefits gained.

While it is evident that altering one's personal life to accommodate work would be associated with the interference of work with home, it is surprising that scheduling home arrangements to accommodate work demands predicted increased levels of WIH for men only. An explanation may be that men have traditionally been expected to prioritize work over home life (Powell, 1997), including making home life flexible enough to accommodate work demands. Now that expectations are changing regarding men's role in the home, and men are increasingly taking responsibility for childcare and becoming more involved generally in family roles (Levine

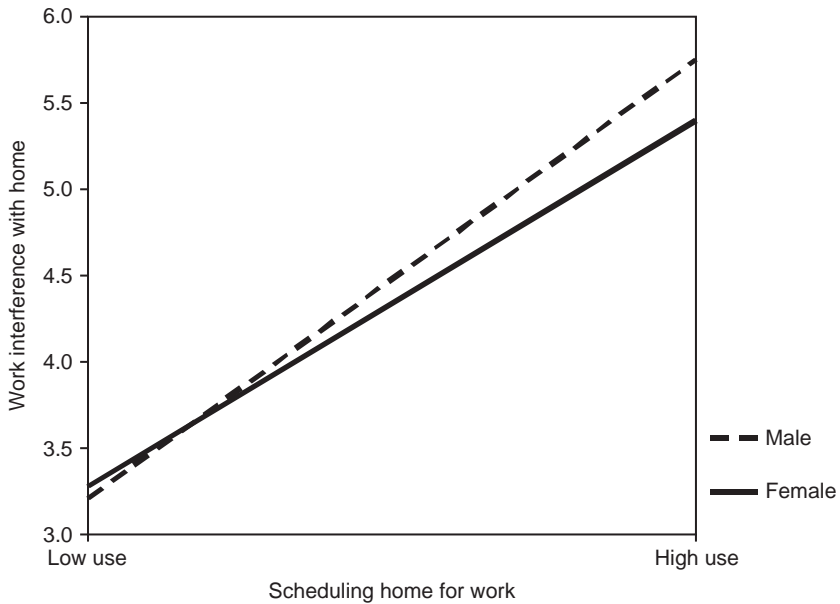


Figure 17.2 *Sex  $\times$  scheduling home for work predicting work interference with home*

and Pittinsky, 1997), clinging to these old ways of working may provoke more interference.

The results of this study have helped to extend previous work–home coping research in several ways. The quantification of coping techniques such as limiting role involvement that have been identified in interview-based studies (for example, Karambayya and Reilly, 1992; Becker and Moen, 1999) has permitted the empirical investigation of their effectiveness in alleviating work–home interference. The distinction between WIH and HIW has enabled an examination of the different effects of various coping strategies upon the two separate directions of interference. However, a number of this study’s findings are also consistent with existing research. As with other studies that have found few or no differences in the coping techniques used by men and women, the results reported in this study have provided no support for the socialization hypothesis. Together with the findings of Paden and Buehler (1995), which indicated that different coping strategies buffered the effects of role overload and role conflict on well-being for husbands and wives in dual-income couples, the results of this study instead suggest that sex differences lie in the efficacy of coping strategies, rather than the frequency of their use.

### **Managerial Implications**

While the results of this study suggest that encouraging employees to ‘think positive’ may reduce their perceptions of work–home interference, managers need to focus on facilitating coping strategies that involve the participation of the organization (such as rescheduling or limiting work activities), rather than relying on individual employees to assume full responsibility for managing competing demands from work and home. Given current demographic and social trends, which have produced a hitherto unprecedented number of dual-earner households, single-parent families, and eldercare responsibilities, it is unrealistic to expect employees to abandon all family or community commitments once they enter the office. Organizations that foster a culture of acceptance and support will be more likely to reap the rewards of a satisfied, balanced workforce. Increased flexibility on the part of managers with regard to their employees’ work–home issues need not mean reduced productivity for the organization. For instance, devolving scheduling or task assignments to employees may yield synergistic benefits. Employees who need to limit or reschedule work–role activities and who are not penalized for discussing these needs openly may find that their colleagues’ desires for flexibility may complement their own. That is, synergies may be achieved when employees can trade time and/or tasks off among one another, with the full blessing of management.

The present study’s findings also make clear that organizations that continue to frame work–home interference as a ‘women’s issue’ are ignoring the needs of their male employees, an increasing number of whom are finding expectations of them based on traditional gender role stereotypes to be constricting and detrimental to their ability to balance demands from work and from home. Despite the public sector’s reputation for being progressive in the area of employee rights and benefits, the organizations participating in the current study have demonstrated the continued need to strive for gender equality with regard to work–home issues. Only when all individuals are acknowledged as warranting equal consideration for their non-work responsibilities will all employees – not only women – experience reduced work interference with home as a result of limiting their work–role activities. Only when managers cease to equate committed workers with those who work standard and consistent hours will all employees have the potential to achieve success both at work and at home. Managers who evaluate employees’ performance and commitment based on results, not on face time or on evidence of concurrent personal responsibilities, will be more likely to enjoy a loyal, satisfied, and productive workforce, able to effectively balance

work and home without fear of negative career repercussions arising as a result.

### Limitations and Future Research

Several limitations to the present study should be noted. First, the cross-sectional design utilised does not allow for firm conclusions regarding causality. Second, more total variance was explained for WIH than for HIW, indicating that the coping strategies and control variables investigated are more useful predictors of WIH than HIW. Furthermore, only for WIH did the additional variance explained by the interactions between sex and coping reach statistical significance. Sex is evidently an important factor in coping with WIH, but its influence on coping with HIW seems less remarkable.

This study has conceptualized coping as an action that either prevents or reduces work–home interference directly. Another approach would be to conceptualize coping as an action that either attenuates or intensifies the effect of a stressor on work–home interference. Future research on work–home coping might wish to investigate the moderating impact of the strategies explored here on the links between situational stressors, such as caregiving responsibilities or organizational time demands, on work–home interference. Given that men and women are affected differently by certain antecedents to work–home interference (Kirchmeyer, 1995), a better understanding of which strategies are effective in reducing the impact of particular stressors would be useful in seeking to alleviate interference for both sexes.

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## 18. Affirmative action attitudes: more complex than we know

**David A. Kravitz\***

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A pretzel-shaped universe requires pretzel-shaped hypotheses.

(Fiedler, 1967: 14)

The public debate over affirmative action is often phrased in terms of isolated main effects. Equal opportunity is good and quotas are bad. Liberals love it and conservatives hate it. Target group members support it and those who are not targeted oppose it.

Although some research on affirmative action attitudes has been similarly simplistic, most recent work has explored the complexities – the shared variance, mediators, moderators, and non-linear effects. Those complexities, and others that have been ignored, are the focus of this chapter. The chapter is organized around the model given in Figure 18.1, which is an elaboration of a model presented in Kravitz and Klineberg (2000). This figure includes many of the concepts (numbered boxes) and paths (identified with letters) discussed below, but other paths are omitted for the sake of clarity.

Researchers studying affirmative action attitudes frequently present information about the affirmative action plan (AAP: Box 1 in Figure 18.1). This work has consistently found that the manipulation of AAP strength affects attitudes. The elimination of discrimination receives the most support, opportunity enhancement practices such as targeted recruitment receive somewhat less support, and procedures that give preferences to affirmative action target group members are opposed (Harrison et al., 2006). Strength of AAP explains more variance in determining affirmative action attitudes than do other predictors (Kravitz, 1995).

Why does manipulating AAP strength affect support? To answer that question, one must delve into the black box of the respondent's mind. The most obvious explanation is that the manipulation affects respondent beliefs about AAP implementation – for example, whether it involves preferences (Path A leading to Box 2). Indeed, assessing such an effect could be construed as a manipulation check. However, research on attitude change



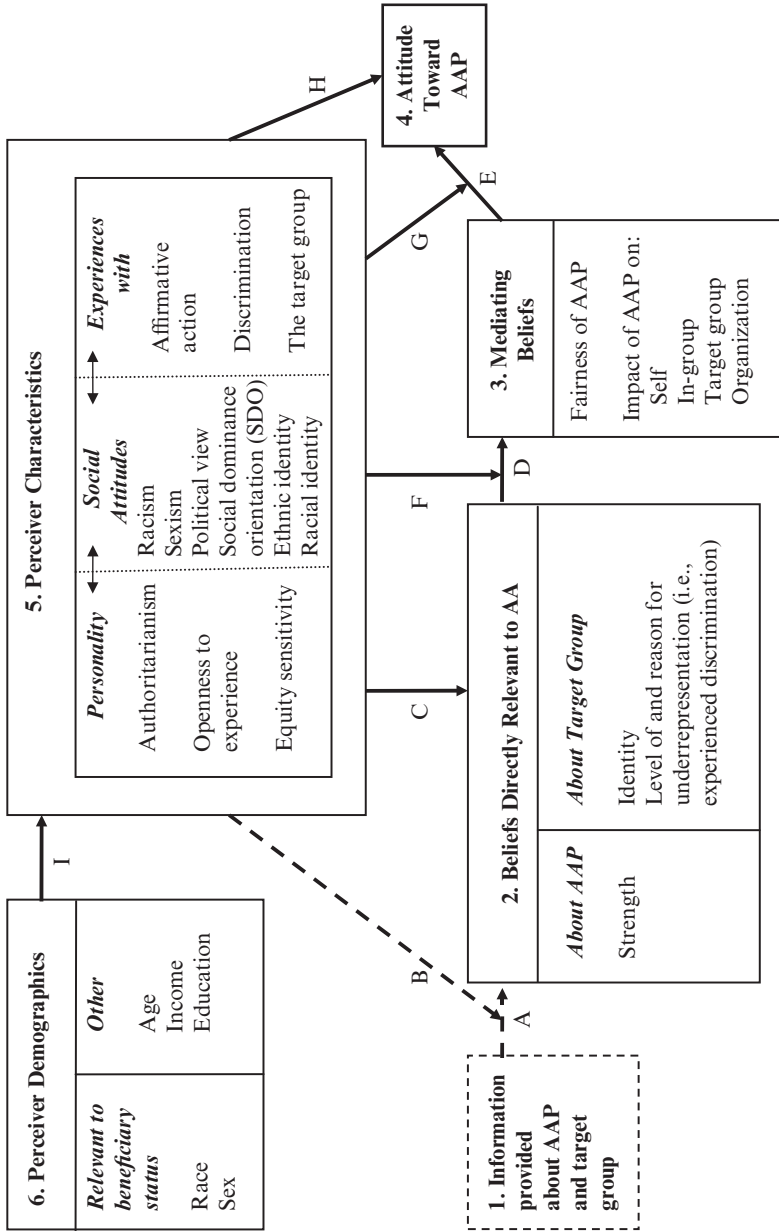


Figure 18.1 A general model of behavioral research on attitudes toward affirmative action

suggests that the situation may be somewhat more complex. Effects of the manipulation may vary with the respondent's prior position. Messages about AAP structure may be rejected and have little effect on beliefs when they are strongly contrary to the perceiver's prior attitude (Diamond, 2001). The impact of the AAP manipulation on beliefs may also be moderated by other perceiver characteristics, such as authoritarianism, racism, or personal experiences with affirmative action (Path B). I know of no research on this moderating effect. Both the moderation effect (Path B) and the effect of the manipulation on beliefs (Path A) are depicted with dashed lines in Figure 18.1, because they apply only if the study includes a manipulation. The remaining constructs and paths apply to all research on affirmative action attitudes, regardless of whether they are assessed.

The focus on beliefs raises another issue. Research indicates that public understanding of affirmative action is flawed, with many people believing it involves preferences for women or minorities rather than equal opportunity and oversight, as the law requires (Kravitz and Platania, 1993; Pace and Smith, 1995; Golden et al., 2001). This observation suggests at least two lines of investigation. First, what perceiver variables predict beliefs about affirmative action law and implementation (Path C)? Research has found that the construal of affirmative action (for example, as equal opportunity or as preferences) is related to social attitudes such as racism (Reyna et al., 2005), political orientation (Jost and Hunyady, 2005), and social dominance orientation (Arriola and Cole, 2001). Beliefs about affirmative action also vary with the perceiver's past experiences (for example, with affirmative action; Stout and Buffum, 1993).

The lack of public understanding suggests a second, related line of investigation: does knowledge of affirmative action law or implementation predict support? To determine the relation between knowledge and support, one must assess knowledge, which requires that one know the 'truth'. This was addressed by several of the studies cited in the previous paragraph, which typically coded respondent descriptions of affirmative action as correct if they included monitoring and as incorrect if they included minority preferences. More detailed assessment of perceiver knowledge of affirmative action law and regulations is possible (Kravitz and Yun, 2005). However, given the number of firms with AAPs and the number of individuals within those firms who affect implementation of the AAP, it may be impossible to establish with any certainty exactly how affirmative action is actually implemented.

The preceding argument posits that the manipulation of AAP strength affects attitudes through its effects on respondent beliefs about how the AAP is implemented. But that implies at least one more link within the black box of the perceiver's mind: why do implementation beliefs affect

affirmative action attitudes? The two mediators that have received the most attention are perceptions of AAP fairness and implications of the AAP for the perceiver's personal or collective self-interest (Path D, Box 3, Path E) (Kravitz, 1995; Nosworthy et al., 1995). AAPs are supported in so far as they are considered fair or are believed to be in the respondent's self-interest (Harrison et al., 2006). Recent work suggests that affirmative action attitudes may also be influenced by beliefs about other consequences of the AAP, including anticipated effects on the target group and on the organization (Kravitz et al., 2008).

It is not uncommon for researchers who are studying reactions to affirmative action to use fairness judgments, rather than attitudes, as the dependent variable. The two concepts are closely related – Harrison et al. (2006) estimated the population correlation, corrected for unreliability, at 0.805 – but they are not identical. Harrison et al. also found that two important predictors correlated more strongly with affirmative action attitudes than with fairness judgments. A related point was made by Lowery et al. (2006), who emphasized that predictor intercorrelations may exaggerate the apparent effect of any one predictor if the other predictors are not also assessed. Furthermore, these mediators may interact. For example, Lowery et al. found that White respondents' fairness judgments were positively related to anticipated benefits of the AAP for the target group, but only if they believed that the AAP would not hurt Whites.

The link between beliefs about AAP implementation and perceptions of fairness or other consequences may be moderated by perceiver characteristics (Path F). For example, it is obvious that the relation between perceived AAP strength and anticipated impact on collective self-interest must be moderated by the respondent group, being more positive for members of the target group than for non-target group members. In addition, commitment to the merit principle may moderate the impact of beliefs on perceived fairness, so that individuals who strongly support the merit principle are especially likely to consider preferential AAPs unfair (Bobocel et al., 2001). Similarly, the link between the mediating beliefs and affirmative action attitudes may be moderated by perceiver characteristics (Path G). For example, the relation between attitudes and both perceived fairness and anticipated impact on the self may be moderated by the perceiver's level of equity sensitivity (Huseman et al., 1987), so that fairness will have the strongest effect on affirmative action attitudes among equity sensitives. Finally, Kravitz et al. (2008) found a complex set of racial differences in correlations between attitudes and anticipated effects of affirmative action on various groups.

I began this chapter by discussing the impact of AAP strength on affirmative action attitudes. I then turned to mediators of that effect and

the moderators of that mediation. In reality, researchers often manipulate AAP strength and measure affirmative action attitudes, without considering any mediating beliefs. As might be anticipated from the preceding discussion, this research has found that the AAP–attitude relation is moderated by perceiver characteristics. For example, the inverse effect of AAP strength on attitudes is larger among White than African American or Hispanic American respondents (Harrison et al., 2006). Furthermore, Kravitz et al. (2008) obtained the usual negative monotonic effect of AAP strength on attitudes among Whites, but a curvilinear effect among Hispanic Immigrants. The latter preferred a recruitment AAP to both weaker (equal opportunity) and stronger (preferences) AAPs.

To this point, I have discussed perceiver characteristics only as moderators of the causal chain leading from AAP information to attitudes. Many studies, however, have focused specifically on the relations between perceiver characteristics and affirmative action attitudes (Path H). Figure 18.1 (Box 5) includes a sampling of the characteristics that have been studied; I do not discuss them individually due to lack of space. Although the figure includes separate categories for personality, social attitudes, and experiences, I assume these constructs are interrelated. Furthermore, I assume the perceiver characteristics are affected by perceiver demographics (Box 6, Path I). For example, African Americans are more likely than Whites to have experienced discrimination and to be politically liberal (Kravitz and Klineberg, 2000). Furthermore, research indicates that education correlates negatively with prejudice, social dominance orientation and political conservatism (for example, Sidanius et al., 1996). Some research has explicitly assessed social attitudes as mediators of the relation between perceiver demographics and affirmative action attitudes. For example, Konrad and Spitz (2003) found that racism mediated the effect of respondent race on affirmative action attitudes.

I previously mentioned that perceiver characteristics moderate the effects of AAP strength on affirmative action attitudes. Because moderation involves an interaction in which identification of one variable as the ‘effect’ and the other as the ‘moderator’ is a matter of conceptual preference, it necessarily follows that AAP strength moderates the relations between perceiver characteristics and affirmative action attitudes. For example, Kravitz and Klineberg (2004) predicted and found that the relation between racial prejudice and opposition to affirmative action among non-Black respondents was stronger when the AAP was of intermediate strength than when it was either very weak (that is, equal opportunity) or very strong (that is, preferences). The meta-analysis of Harrison et al. (2006) found that AAP strength moderates relations between affirmative

action attitudes and respondent race, respondent gender, personal self-interest, and racism.

Until now, we have ignored the effect of AAP target group (Box 1). Researchers sometimes provide information about the AAP target and even when no information is provided, respondents are likely to make assumptions about who is targeted (Box 2). For example, Kravitz et al. (2000) found that respondents were more likely to assume that affirmative action targeted African Americans and Hispanic Americans than that it targeted women, Asian Americans, or Vietnam veterans. Research has found that support for affirmative action is lower when the AAP targets African Americans than when it targets other groups (for example, Murrell et al., 1994; Steeh and Krysan, 1996). At least two plausible causes for this effect can be proposed. First, it could be due to racial prejudice. In an unobtrusive test of the effect of prejudice, Kravitz et al. (2000) observed more negative attitudes among respondents who spontaneously identified African Americans and Hispanic Americans as affirmative action targets than among respondents who did not identify those groups. Second, it could be due to the perception that the other groups are more deserving of assistance. Consistent with that explanation, Smith and Kluegel (1984) found that US residents believe women suffer more discrimination than do Blacks. This second explanation is based on the assumption that the public supports affirmative action when it serves to counter the effects of discrimination. This assumption has received ample support (Harrison et al., 2006). Note, however, that underrepresentation in the absence of discrimination does not increase support for affirmative action (Kuklinski et al., 1997; Stoker, 1998).

The relation between target characteristics and affirmative action attitudes will be moderated by perceiver characteristics. Given the importance of self-interest, one might expect attitudes to be more positive among members of the target group than among others. For example, Strolovitch (1998) found that women were more supportive of anti-discrimination policies when the policies targeted women than when they targeted Blacks, whereas the support of men was not affected by target group. Similarly, Bobo and Kluegel (1993) found that opportunity-enhancing policies that targeted the poor were liked equally by Blacks and Whites. When the policies targeted Blacks, approval remained constant among Blacks but dropped among Whites. Finally, Sniderman et al. (1991) found that respondents were more supportive of government intervention to guarantee equal opportunity for women than for Blacks and the effect of target group increased as education decreased.

In the preceding paragraphs, I have attempted to illustrate the utility of Figure 18.1 for organizing research on affirmative action attitudes. This

model also has implications for the possibility of attitude change in the workplace. Perceiver demographics and most perceiver characteristics are beyond the organization's control. However, an organization can improve its management of diversity by providing information about the AAP and can also affect its employees' experiences. For example, by implementing a legal AAP that excludes preferences and by publicizing the details of that AAP, an organization can decrease the opposition that typically follows from preferential affirmative action. Furthermore, diversity management activities could provide all employees with factual information about the ongoing effects of historical discrimination and could give those who belong to different demographic groups the opportunity to learn about one another. The model suggests that such actions may stimulate support for affirmative action.

Figure 18.1 is necessarily a simplification of the conceptual complexity of affirmative action attitudes. The model omits several effects (paths) discussed above, does not indicate whether effects are linear or non-linear, and omits potential recursive effects (that is, effects of affirmative action attitude on acceptance of new information). It also ignores national differences in affirmative action implementation (Jain et al., 2003) and cultural effects on attitudes. For example, Holladay and Quiñones (2005) found that trainees from collectivistic cultures were less receptive to diversity training than were those from individualistic cultures; could a similar effect exist for reactions to affirmative action? Despite the simplification of Figure 18.1, it is clear that any attempt to explain in detail attitudes toward affirmative action must take into consideration a myriad of factors. Affirmative action attitudes are complex and our research designs and procedures must be similarly complex.

## NOTE

- \* I would like to thank Barbara Martin, Eden King, and the members of the GMU OB/IO research discussion group for their helpful comments on an earlier version of this chapter.

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## 19. Headcounts and equal opportunity: people accounting in the workplace

**Stephen M. Garcia, Mitchell J. Meyle and Eric A. Provins**

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### INTRODUCTION

CEOs, executives, directors, and managers routinely decide the outcomes of highly competitive events, whether making the final call on a hiring decision or selecting one star employee among many to be the coveted ‘employee of the year’. In this latter case, for example, imagine that the two top candidates are Ms. Jones – a *marketing* analyst – and Ms. Smith – a *financial* analyst. Assuming they both are highly qualified, both candidates would have a 50/50 chance, so to speak, of earning the title of ‘employee of the year’. However, imagine further that in four of the past five years, the award has always gone to someone in marketing. In this case, we posit that the award-winning chances would precipitously fall for the marketing candidate and precipitously increase for the finance candidate.

While affirmative action policies (Zuriff, 2004; Crosby et al., 2006) have arguably changed the way we allocate awards and opportunities on the basis of gender or race, affirmative action policies obviously make no special provisions for employees from ‘marketing’ versus ‘finance’. In this chapter, however, we extend the implications of a social psychological theory called ‘people accounting’ (Garcia and Ybarra, 2007) to human resource management to demonstrate how headcounts along a wide range of mundane social category lines have the potential to affect how we allocate rewards and opportunities in the workplace.

## WHY EVEN MUNDANE SOCIAL CATEGORIES MATTER

The social categorization literature (Turner et al., 1987; McGarty, 1999) has established that people attach emotional value to their social category memberships (Abrams and Hogg, 1988, 1999). In fact, more recent research suggests that it is especially difficult for groups from different social categories, say an ‘American’ company versus a ‘French’ company, to maximize joint gains (Garcia et al., 2005). For instance, Americans would rather have less-lucrative equal outcomes (for example, \$500 – Americans / \$500 – French) than more-lucrative but disadvantageously unequal outcomes where the French earn more from a joint venture than themselves (for example, \$600 – Americans / \$800 – French). On the other hand, if both companies were from the same social category (that is, Americans), then people would be willing to maximize joint gains, even if it means they will profit less than the other company. Thus, the implication is that group members will experience a greater pain of upward social comparison when they are getting paid less than another group in *inter-category* situations (that is, Americans versus French) than in *intra-category* situations (that is, Americans versus Americans).

While actual group members become sensitive to inequalities in inter-category situations, third parties also become more sensitive to inequalities in inter-category situations than intra-category ones (Beggan et al., 1991; Garcia and Miller, 2007). Although third parties do not experience the same pain of upward social comparison as actual group members do, Garcia and Miller show that third parties can certainly recognize an affective disparity – the ‘hedonic gap’ – that would arise between the winning and losing sides of an inter-category situation. Garcia and Miller hypothesize that third parties will consequently become more averse to using winner-take-all solutions to resolve inter-category disputes than intra-category ones, even when such winner-take-all outcomes are created by the fair toss of a coin (see Elster, 1989, 1992; Blount, 1995; Bolton et al., 2005).

To illustrate this point, Garcia and Miller conducted a series of decision-making studies about whether or not to resolve conflict with winner-take-all solutions. In one particular study, University of Michigan undergraduates were asked to read one of two conflict situations. Participants in the *intra-category* condition read the following:

The Class of 1994 is deciding where to host their class reunion. Six hundred alumni were asked to rank a list of seven possible hotels. As you can see below, the alumni are divided on their first choice: half the alumni want the Marriott

and half the alumni want the Hyatt. In fact, as you can see below, they do not agree until their fourth choice, the Radisson Hotel.

Inspecting a table, participants saw the preference orders for both sides (Marriot, Westin, Hyatt, Radisson, Hilton, Sheraton, and Doubletree versus Hyatt, Doubletree, Marriot, Radisson, Westin, Hilton, and Sheraton). Participants in the *inter-category* condition read the same scenario, except that now the dispute was between ‘in-state’ and ‘out-of-state’ alumni. All participants were asked, ‘If only the following options were available, where should the reunion be held?’. The two options were (a) flip a coin for their first choice (Heads = Marriott, Tails = Hyatt); and (b) choose the Radisson. Note that, actually, option (b) is a mutually less preferred hotel than the first choice of the other side.

Results showed that 84 percent of the participants in the intra-category condition chose to flip a coin to resolve this dispute. However, only 58 percent of the participants did so in the inter-category condition, where they were more willing to choose the mutually less preferred, suboptimal option (b). The implication of this study as well as the other ones (see Garcia and Miller, 2007) is that third-party observers are far more reluctant to create inequalities in order to preempt a ‘hedonic gap’ or an affective disparity between the winning and losing sides of a coin toss, despite the fact that tossing a coin is procedurally fair (Blount, 1995; Bolton, et al., 2005). As we shall see, this concern for preempting a hedonic gap between members of different social categories has the potential to affect how we determine rewards and to whom we grant opportunities.

## HEADCOUNTS AND SOCIAL CATEGORY LINES

Building on the fact that third parties became reluctant to create inequalities along social category lines and that third parties even became averse to resolving inter-category preference disputes with the procedurally fair toss of a coin, a recent theoretical development in distributive justice (Garcia and Ybarra, 2007) presents ‘people accounting’ – a hypothesis which posits that a simple numerical imbalance in representation along even mundane social category lines can affect third parties’ decisions on whom to reward and offer opportunities in highly competitive situations.

Garcia and Ybarra provide evidence of people accounting by focusing on nominal social category lines, not merely the highly politicized social categories of race and gender. For instance, in one study, undergraduates from the University of Michigan all read about a hypothetical scenario

where the Association for Psychological Science was determining which graduate student to select for the best dissertation award. Participants in the *control* condition were told: 'For the past 10 years, none of the 10 winners have been graduate students from Stanford University', whereas participants in the *people accounting* condition were told: '8 of the 10 winners have been graduate students from Stanford University'. All participants were then asked, 'To what extent would you feel some pressure to avoid selecting a graduate student from Stanford? (1 = no pressure at all; 7 = a lot of pressure)'.

Consistent with the people accounting hypothesis, results showed that participants in the people accounting condition felt significantly more pressure to avoid selecting 'Stanford' graduate students compared to those participants in the control condition. In this case, to the extent that Stanford students were an overrepresented social category, impartial third-party observers began to feel more pressure to categorically deny them equal opportunity. A conceptually similar study asked participants to choose whom they would recommend hiring as new faculty where the social category line was based on where the faculty candidate received his/her PhD. In a condition where participants were aware that many of the existing faculty received their PhD from 'Berkeley', the candidate from 'Berkeley' was chosen significantly less often. Again, to the extent that a social category is overrepresented (that is, Berkeley), the winning chances for a member from an overrepresented category will drop at the discretion of impartial third parties.

People accounting can also happen in the context of replacement, when impartial third parties are determining who should fill a spot vacated by a previous employee. To demonstrate this, Garcia and Ybarra (2007) asked participants to pick a replacement for a retiring high school teacher whom participants were told was either an African American, leaving behind only one other African American teacher, or a Latino American, leaving behind only one other Latino teacher. Participants then received two résumés from African American and Latino candidates and were asked to recommend a replacement. Results showed that when the African American was retiring, 83 percent of the participants chose an African American replacement. However, when the Latino American was retiring, 52 percent chose a Latino replacement and only 48 percent chose the African American candidate. Although this study focuses on racial social categories, note that this analysis is far from any prototypical 'affirmative action' example. In this case, either African Americans or Latinos were categorically excluded, depending on their relative representation in the social category context.

While people accounting can occur along a wide range of nominal

social category lines, people accounting is more likely to be triggered on a meaningful social category dimension versus a less meaningful one. For instance, as additional findings suggest, people accounting is more likely to occur along a meaningful dimension such as ‘continent’ (that is, Europe versus Asia) or ‘university’ (that is, Alabama versus Auburn) than a generally less meaningful one such as ‘handedness’ (that is, right- versus left-handed). However, it must also be emphasized that the meaningfulness of any social category line is context specific; to the extent that a given social category dimension has greater relevance in a particular context, so too will it have even greater meaning. For instance, even ‘handedness’, which seems rather vapid, can gain greater meaning if the context pertains to right- or left-handed batters, anglers, or handwriting desk test-takers. Nevertheless, these empirical findings (Garcia and Ybarra, 2007) reveal how headcounts along nominal social category lines have the potential to affect decisions in the workplace.

## IMPLICATIONS FOR EQUAL OPPORTUNITY IN THE WORKPLACE

Although the empirical findings on people accounting are based on studies using the psychological decision-making methodology, they undoubtedly shed light on how people often make decisions in the workplace. While we already know that not everyone in the workplace will have an equal opportunity due to ingroup favoritism (Turner et al., 1979), a situation in which fellow ingroup members are favored over non-ingroup members for hiring or promotions, the present analysis explores the complementary perspective of impartial third-party deciders and highlights the fact that not everyone may have an equal opportunity in the workplace if there is a perceived imbalance along social category lines. For example, impartial decision makers in the organization might think that an employee of the year award could go to a person from ‘finance’, ‘human resources’, or ‘marketing’. However, if they suddenly become aware that a person from marketing has not been given this honor in 10 years, then the award-winning chances of the marketing person will greatly increase while those of the finance and human resources candidates will decrease.

In a related application, one may consider how people accounting might affect the opportunity to serve in important public institutions such as the US Supreme Court. The appointment process for positions on the Supreme Court begins when the President of the United States nominates a candidate and then receives confirmation from the Senate. At the present

time, five of the nine justices on the Supreme Court are 'Catholic'. If the President or the Senate were to recognize this social category line, namely Catholic versus non-Catholic, then people accounting would predict that during the next nomination process the President and Senate would more likely confirm a non-Catholic to the Supreme Court than a Catholic. Of course, the implication is that prospective Catholic candidates will be categorically denied serious consideration, regardless of the impeccability of their judicial record or educational credentials.

Similar balancing acts could be seen with respect to the number of Eastern versus Western Europeans working at corporate headquarters, the number of EU versus non-EU citizens on the board of an international company, or simply the number of males or females reporting to a manager. In this last case, for instance, a manager could be concerned that there are not enough females or males reporting to her or him. Consequently, opportunities to join the team could be influenced by the present gender composition of the team. However, managers must first recognize an imbalance along gender lines in order to trigger people accounting, and there are undoubtedly individual differences in what people perceive as an imbalance. For some managers, a 60/40 percent spread of male to female employees could prompt them into people accounting mode, while a 90/10 percent spread might be necessary for other managers. Naturally, however, such imbalances are offset in occupations where a particular social category dimension is highly skewed, such as among commercial pilots or nurses.

## IMPLICATIONS FOR AFFIRMATIVE ACTION POLICIES

Perhaps the most notable implication of the present analysis is that affirmative action policies may have far deeper psychological roots. Detractors from race- and gender-conscious employment policies have claimed that the identification of potential candidates with certain social categories merely distracts employers from judging individual merit and are largely irrelevant to hiring decisions. However, the present analysis suggests that competitive events that result in winner-take-all allocation decisions can trigger social category-based choice even when the social categories themselves (university affiliation, geographical location and so on) are not gender or racial ones. While affirmative action programs attempt to rectify historical inequities as well as promote diversity, people accounting explains a much broader aversion to imbalances across social category lines. This propensity to seek equitable solutions to intergroup conflicts

manifested within interpersonal allocation decisions is not merely a legacy of diversity-minded directives such as President Johnson's Executive Order 11,246 in 1965 which prompted the initiation of affirmative action policies in the United States, but rather a basic tendency emerging from social category-based choice.

This suggests that one possible avenue for those who wish to maintain the continuity of affirmative action programs after unfavorable legislation or court decisions, such as the US Supreme Court decision in *Gratz v. Bollinger* (2003) that limited how diversity enhancing programs could operate in assessing potential candidates or after the '25-year' expected lifespan for the requirement of diversity programs suggested by Justice Sandra Day O'Connor in the 2003 *Grutter v. Bollinger* case, would be to promote diversity programs as an enhancing supplement to the natural propensity to create fair and equal distributions among members of a wide range of social category groups including, but more importantly beyond, merely race and gender. This approach, which would emphasize how race- and gender-conscious programs arise organically from natural feelings of empathy and justice, would offer a new way to extend a national dialogue concerning issues dealing with social categorization and identity politics. By highlighting the widespread practice of people accounting beyond race and gender lines, it is possible that more people would be willing to extend support to such programs, especially since race and gender are routinely associated with real differences in economic power whereas other people accounting social category lines such as being 'Catholic' versus 'non-Catholic' or from 'Princeton' versus 'Stanford' are not.

Nevertheless, we must emphasize that people accounting does not always result in the final selection of members of underrepresented social category groups. While people accounting is supported by a natural aversion to unequal distributions in social category representation, the process itself relies upon an objective perspective and the ability to identify an imbalance in the resolution of conflicts along salient social category lines. As long as decision makers do not or choose not to recognize a numerical imbalance between social categories, or are partial to one category in the dispute, people accounting will not take place. In addition, research shows that such candidates might make it to a short list but not necessarily the final selection (Monin and Miller, 2001), as the process of short-listing often takes away feelings of prejudice and extinguishes any compunction to make a final social category-based selection. However, people accounting is possibly a more powerful predictor of the final selection along nominal social category lines, which are arguably less prone to such 'moral licensing' effects.

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## PART V

Labour politics, trade unions, equality and  
diversity



## 20. Trade union perspectives on diversity management

**Anne-marie Greene and Gill Kirton**

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### INTRODUCTION

In the UK, the traditional ‘equal opportunities’ (EO) agenda has been eclipsed by the concept and language of diversity management (DM). While EO has at its centre the social justice case for equality, primarily based on gender and race (but also on disability, sexual orientation and age), at the centre of DM is the business case. The claim of DM is that organizations can derive economic gains from a diverse (in the broadest possible sense) workforce. While critical literature on how UK organizations understand and operationalize the concept of diversity is now beginning to emerge (Maxwell 2004; Foster and Harris 2005), there has been very little discussion about how trade unions have responded to the spread of the diversity approach. We have aimed to open up this area of enquiry, arguing that it is important, particularly in the UK context, where there is still a significant level of unionization especially in the public sector, to consider what the shift from EO to DM means for trade unions (Greene et al. 2005; Kirton and Greene 2006).

### THE ROLE OF TRADE UNIONS IN ADVANCING THE EQUALITY AGENDA

First, it is necessary to step back and to consider the role that trade unions have traditionally played in promoting and advancing equality in UK workplaces. It is well established that employers do not always take voluntary action to improve their policies and practices and that ‘bottom-up’ pressure from non-management employees for equality is often necessary to trigger action beyond minimal legal compliance. Such action can be and often is exerted through trade unions and can be just as important as the ‘top-down’ commitment of senior management (Colling and Dickens 1998) that proponents of DM prefer to emphasize (Kandola and Fullerton

1998). Dickens et al. (1988: 65) highlighted this in their research into 'equality bargaining' in the 1980s, arguing that a 'review of discriminatory terms and practice is more likely to occur where there is some form of joint regulation than where issues are unilaterally determined by employers'. In support of the ongoing importance of joint regulation, there is recent evidence of considerable levels of trade union action on equality in the UK and other countries (Colling and Dickens 2001; Greene and Kirton 2006). So, what does a shift towards diversity mean for the equality project and the role that unions play? A key issue for us is the identification of three main features of DM seen as a potential threat to trade unions.

## DIVERSITY MANAGEMENT AND THE THREAT TO TRADE UNIONS

First, as stated, the key analytical differentiation between EO and DM is that while the former reflects a moral concern for social justice, the latter is underpinned by the business case (Kaler 2001; Noon and Ogbonna 2001). Naturally the DM approach appeals to management critics of traditional EO, who have argued that the moral cause of equality has little purchase in the competitive world of business. Trade unions, on the other hand, as champions of social justice, have been generally supportive of EO aims and have sometimes been at the forefront of equality campaigns, particularly in the public sector. However, we argue that unions have cause to be sceptical about the business-driven DM approach. The proponents of DM usually emphasize four main advantages to business: taking advantage of diversity in the labour market, maximizing employee potential, managing across borders and cultures, creating business opportunities and enhancing creativity (Cornelius et al. 2001). Although there is evidence that some organizations have constructed a business case for gender equality, critics of the business case argue that it is contingent, variable, selective and partial and often harder to make for other forms of inequality. Thus the business case is regarded as an insecure foundation for advancing the equality project (Dickens 1994, 1999; Colling and Dickens 2001; Kaler, 2001) and therefore is rightly viewed by unions with suspicion, as our research shows. Trade union officials in our research express concern that DM might be used as a smokescreen to divert attention from 'difficult to tackle' equality problems, particularly race/ethnic issues. Further, we find that unions are disturbed by what Prasad and Mills (1997) see as the implicit commodification of labour as an organizational resource that is evident within the business case for diversity. For example, one senior trade union official told us that she was concerned that the idea of

'harnessing' employees 'like horses' (see Kandola and Fullerton's (1998) definition of 'Managing Diversity') had unpleasant and exploitative connotations (Kirton and Greene 2006).

The second prominent and problematic feature of DM from a trade union perspective is the emphasis on individual difference, rather than on social group-based difference as within EO. It has been argued that 'there is no room for group claims' within the discourse of diversity (Jones et al. 2000: 369), suggesting that approaches, such as positive action, that have been used to redress historic group-based disadvantage, no longer have a place within policy. Although it is true to say that not all trade unions have always supported positive action initiatives (Kirton and Greene 2002), our research suggests that trade union equality officers, at least, would lament their disappearance from the suite of equality initiatives. Further, a shift in focus to individual difference could lead to less emphasis on the standardized policies and procedures designed to minimize, if not eliminate discrimination (for example, job evaluation), that trade unions have long campaigned for and to greater diffusion of individualized human resource management (HRM) techniques (for example, performance appraisal and performance pay) that trade unions tend to dislike. Our research shows that trade union officials are concerned that individualized techniques have a strong tendency to reproduce or reconstruct forms of social group-based discrimination and disadvantage.

Although it goes without saying that everyone is different from everyone else in an infinite number of ways, if these myriad differences are all viewed as equally salient for life chances, then it becomes difficult for trade unions to develop any specific campaigns and to propose any specific programmes of action. Our research found that trade unionists welcomed a broadening of the agenda beyond the narrow conception of difference (that is, gender and race) commonly associated with EO, but at the same time that they feared a diluting of the agenda to the point where diversity policy making could become a vacuous irrelevance and do nothing to make workplaces more inclusive (Kirton and Greene 2006).

The third problem from a trade union perspective is that DM is positioned as a top-down policy approach initiated by senior management and implemented by middle managers (Cornelius et al. 2000). This contrasts with EO within which there has traditionally been room for union involvement at organization or workplace level. It is notable that most organizations held up as exemplars of DM are predominantly non-union (Kandola and Fullerton, 1998; Liff, 1999), although many unionized organizations have certainly adopted the diversity discourse. Nevertheless, like its parent concept, HRM (Webb 1997; Kirton and Greene 2005), DM is essentially a unitarist approach which theoretically fits best with non-union

organizations (Miller, 1996: 206), or at least with organizations where the union has been emasculated or simply fallen into dysfunction. Therefore, mirroring the debate about the role of unions within HRM (for example, Guest, 1987), one of the theoretical concerns about DM is that the traditional union role as advocates for employee rights might be marginalized. The new focus on the individual employee and the identification of diversity as a top-down, managerial activity (Kandola and Fullerton, 1998; Liff 1999; Maxwell 2004) potentially threatens union involvement. This is especially salient and ironic in the present context when there is renewed legitimacy accorded to unions by the polity at national and European levels and some evidence of a strengthening platform for collective bargaining (Colling and Dickens, 2001). Moreover, the top-down focus and the associated marginalization of the role of trade unions within DM has significant implications for stakeholder involvement. In the majority of organizations in our study of diversity practitioners (Kirton et al. 2007), interviewees commented that 'leadership' of diversity issues had to come from all levels of the organization, including non-management employees. However despite this, in practice only a small number of organizations had integrated multi-channel forms of communication and consultation that genuinely seemed to be trying to engage employees proactively. This is despite wider evidence of the positive effects of a joint regulatory approach (Konrad et al. 2008).

## DISCUSSION AND CONCLUSION

We draw three main conclusions from our research looking at trade union perspectives on DM. First, our research and analysis indicate a strong degree of incompatibility between DM and trade union thinking on equality and diversity. However, despite the claim of being a new way forward (Kandola and Fullerton 1998), it is clear that in the case of UK employers, many traditional EO issues (including, for example, policies addressing 'work-life balance' and the 'glass ceiling' facing women), are contained within DM and sometimes organizations use the two labels interchangeably or have two parallel policies so that the traditional EO agenda does not entirely vanish (Cornelius et al. 2001; Kirton 2002). Therefore, in practice, the extent to which DM now or in the future poses a threat to trade union action on equality is debatable. Indeed, it might be argued that in a context of low, albeit stabilized, union membership, the unions have far more to worry about than the appearance of DM and that bolstering membership is what will give the unions back their influence on the equality agenda. Nevertheless, the emergence of DM in an era of trade union

decline is hardly a coincidence. While it is important not to overstate the role unions have traditionally played in promoting equality, in Dickens's (1997) ideal model of EO practice, the role of trade unions is seen as a vital piece of the 'jigsaw' making up the campaign for equality in the workplace. A joint regulatory approach to equality is arguably more concerned with the 'sticky floor' than with the 'glass ceiling'; that is, with the rights and conditions of employees at lower levels of organizations. Any attempt to undermine this role has to be deleterious for equality. This takes us to the second concluding point.

Unions clearly can be criticized for not having 'their own house in order'. Their 'mixed record' (Dickens et al. 1988: 65) on challenging discrimination and inequalities and the fact that the bargaining agenda has not been as progressive as it might have (Colling and Dickens, 2001) is partly because the *process* of bargaining has been white male dominated. Another reason is that liberal 'sameness' models of equality (Jewson and Mason 1986) have shaped trade union thinking, meaning that unions have been preoccupied with achieving procedural rather than distributive justice. However, in the context of decline, UK unions have been compelled to confront the reality of workforce diversity and a discourse of difference or diversity is now permeating the way they conceptualize the equality project. One concrete sign of a culture of greater inclusion is the fact that women and black and minority ethnic people are now increasing their presence in the union officialdom (Kirton and Greene 2002). Of course the supreme irony is that unions have begun to engage with workforce diversity at a time when their influence and ability to act at workplace level is relatively weak and when it is clearly difficult for them to reclaim DM in order to make it work towards equality for all. The unions just have to hope that it is not a case of too little, too late.

Third, it is clear by now that the discussion of trade union perspectives on DM is situated within a changed employment relations context, where unions have greater difficulty mobilizing support for collective action, arguably rendering them more dependent on maintaining a cooperative relationship with management. Although for reasons discussed above, DM might theoretically pose a threat to trade union action on equality, union officials in our research were prepared and, they felt, able to work critically with DM in order to pursue equality objectives on behalf of their members. Our research therefore suggests that it is possible for trade unions to capture the diversity discourse and reformulate it in ways that work towards social justice. In this sense, DM might be less of a threat to trade unions and more of an opportunity to refresh a waning employer commitment to the traditional social justice case of EO. If to do this, it is necessary for unions to be more assertive in highlighting for employers



the business case for diversity, our research indicates that they will be prepared to do so.

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# 21. Encounters between gender and labour politics: towards an inclusive trade union democracy

**Sue Ledwith\***

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## INTRODUCTION

How might a really inclusive gender and diversity democracy in trade unions be achieved, and what forms of feminist praxis (theory into practice) might be involved?

This is an urgent question for women and diversity groups both inside and outside trade unions, and for trade unions themselves. It is framed at what I call a key 'long moment' or window of opportunity, a point of encounter between the hot topic of trade union renewal, and the demand for gender and diversity democracy in unions. Both have been extensively theorised and argued. Here I ask what might such a model of feminist praxis look like? What are the key issues and social processes involved?

I draw on ideas from sources which focus on political praxis. In particular I find Antonio Gramsci's discussions of hegemony, the social processes involved in the development of counter hegemony, and opportunities for revolution provide a compelling framework for action. Second, arguments for a politics of difference and identity, and of social justice, for example by Carole Pateman, Nancy Fraser and Iris Marion Young, offer a framework of rights of inclusion. The praxis then becomes how these connect, and so I draw on models which can help identify processes of consciousness development and empowerment and the links to mobilisation, collective action and transformation.

## AGAINST GENDER CLOSURE REGIMES AND TOWARDS STRATEGIES OF INCLUSION

Previously, my colleague Fiona Colgan and I (Ledwith and Colgan 2002) set out a model of overlapping and interrelated gender regimes of closure

and power within labour organisations against women especially, but also in relation to race, ethnicity, caste, religion, sexuality and disability. These involve practices of and responses to exclusion and demarcation, modes of inclusion and consequences of aspects of inclusion, especially usurpation and displacement, and strategies of transformation and coalition. In discussing these further, and drawing on Gramsci's dynamic of class relations: hegemony, I suggested that in order to secure forms of inclusive democracy for previously marginalised groups against the traditional masculinised union hegemony, there was a need for a strategy of counter hegemony and transformation (Ledwith 2006a). Here I consider further key ways and means involved, through a Gramscian analysis of the social processes involved in the destabilising of the dominant hegemony and the development of a counter hegemony.<sup>1</sup> These are: the crisis of the existing order or hegemony; the development of an alternative hegemony of inclusion, the processes and actors involved, especially the role of intellectuals, the development of political consciousness, empowerment and radical action, the use of alliances and coalitions and the politics of mobilising and transformation.<sup>2</sup>

## CRISIS

### **Crisis of the Old**

There is wide agreement that labour movements worldwide are in a critical period. These are variously discussed as, at worst, being in crisis (Turner 2004; Metcalf 2005) or more optimistically, as seeking renewal and revitalisation (Kelly 1998). Globalisation provides the major contextual force, where, as the global labour force has expanded, formal labour markets have shrunk, and informal labour markets have expanded rapidly. Consequently, working conditions have segued into precariousness in the face of trade liberalisation, deregulation and frequent violation of human, worker and trade union rights. Changing patterns of gender relations have been central as women especially have been drawn into the new sectors. The new workforces are young, culturally and ethnically diverse, overwhelmingly female, and unorganised, vulnerable, and frequently without rights. As the ILO points out, these are 'important and complex forces at work; forces which are seldom gender-neutral' (2002: 27). Women now make up around 50 per cent of the workforce worldwide, are increasingly joining unions where they can, yet make up only 1 per cent of trade union governing bodies worldwide (ILO/ICFTU 1999).

Although the institutions of organised labour remain robust and

essential engines for renewal, on their own and in their traditional forms, they are no longer able to withstand these pressures, 'if not open attack', from employers, governments or both (Turner 2004). The traditional model, with its core strength derived from a masculine exclusivity and selective membership, is insufficiently robust or adaptable to withstand globalisation and restructuring. Memberships among the traditional workforces have plunged (Verma et al. 2002: table 1) and the rigidities of the old order frustrate attempts to replenish from the new workforces.

### **Crisis of the New**

To these new potential members, unions come across as exclusive, inflexible, unfathomable strongholds of maleness and masculinity, and increasingly among younger workers, irrelevant (Lopata 2007). A survey by the ICFTU Women's Committee in 2000 found that 72 per cent of non-unionised women said that the most important reason they did not join unions was because they did not understand how unions could help them (ILO 2002: 81). Not surprisingly, those members remaining become less and less representative of the workforce; they are 'male, pale and stale', with this profile especially reflected in their leaderships.

Here, then, is a Gramscian 'historical conjuncture' (Gramsci in Showstack Sassoon 1982: 97) of two paradoxical phenomena: labour movements in crisis and seeking renewal in the new globalised economy, while those groups of workers, mainly women, who can provide both new members and new ways of mobilising, are so often to be found working in the informal and private service sectors, in unprotected, precarious work where it is difficult and dangerous to organise collectively in traditional forms.

### **Opportunity of Crisis**

In this disintegration of the old order of trade unionism, a special opportunity, a Gramscian moment of fluidity (Showstack Sassoon 1982: 98) arises for the politics of gender and diversity justice and democracy to challenge the hegemony of traditional masculinised trade unionism. As Connell has put it, 'when conditions for the defence of patriarchy change, the bases for the dominance of a particular masculinity are eroded' (1995: 77). Already there is plenty of evidence from both unions and from marginalised groups, of new ways of organising and mobilising, and also of emergent and forceful narratives of diversity and difference. How are these turned into an effective counter hegemony in order to seize this 'long' moment?

## DEVELOPING A COUNTER HEGEMONY

Hegemony has many strands and facets; culturally it can be seen to be about ideology, legitimacy, and socialisation. But it is also a political principle, a form of strategic leadership and a guide to political action enabling reformulation of the 'question' (Buci-Glucksmann 1982: 117, 118). It is also a strategy for the gaining of the active consent of the masses through their self-organisation.

Gramsci discussed two main ways to subvert and transform the dominant hegemony: war of manoeuvre, or revolution, and war of position, a long struggle across the institutions of civil society (Strinati 1995). Such a war (of position) is a strategy developed over an earlier period, a state of permanent revolution (Gramsci in Showstack Sassoon 1982). For feminists and sister-travellers<sup>3</sup> who are interested in developing a counter hegemony of inclusive politics of justice and difference, this is part of our 'longest revolution' (Mitchell 1971).

Developing a counter/alternative hegemony can be seen to involve four key aspects: formation of movement intellectuals, development of arguments of social justice, empowerment of the oppressed, and mobilising.

### Intellectuals

In *this* discussion, broadly, intellectuals can be identified in two main groupings: as 'movement activists'; feminist and sister-traveller activists in trade unions, in communities, social movements, non-governmental organisations and civil society. In Gramscian terms it is from these 'masses' – or movement/s – that the leaders and intellectuals emerge to become a vanguard of thinkers and organisers; of 'permanent persuaders' (Gramsci in Vaccì 1982). Here, these are marginalised union members and potential members, especially women, black and minority ethnic (BME) members, lesbian, gay, bi-sexual and transgender (LGBT) and disabled members, often organising autonomously, in pursuit of inclusive union democracy and social justice – formations of democratic thinking and collective action 'from below' (Pateman 1970; Young 1990, 2000). A second group, 'movement thinkers' includes feminist researchers and activists engaging with and working with trade union women in gender and labour movements locally, nationally and internationally and in a range of ways, such as joint research projects, round tables and international e-networking (Greene et al. 2003; Ledwith 2006a).

### **Arguments and Strategies**

Movement thinkers have provided sharp critiques of masculine hegemonic traditional labour unionism which range across feminist scholarships of liberalism, radicalism, dual systems and post-structuralism. Such analysis is sometimes difficult for movement activists to embrace, being viewed as separatist and divisive of the core belief system in labour movements of 'solidarity' – itself a masculine discourse (and ripe for further analysis). These labour movement activists tend to favour arguments based on liberal concepts of gender equality; of sameness, with measures put in place aimed at eliminating or ameliorating barriers to women's participation and at the same time, to make existing structures and cultures more 'women friendly', by providing provision of childcare, changing meeting times and places (Coote and Campbell 1987; Cunnison and Stageman 1993; Lawrence 1994; Colgan and Ledwith 1996).

However, the combined effect of the sluggish progress involved in 'inching towards equality extremely slowly' (SERTUC 1997), and developing challenges from BME unionists, LGBT, and disabled campaigning groups, has seen difference and diversity arguments of identity politics and agendas taking hold and the formulation of demands for new forms of inclusive recognition, representation and access to resources – persuasive political programmes. These arguments and debates can be read in the work of movement thinkers such as Iris Marion Young and Nancy Fraser. For example, Young (1990) argues for an inclusive democracy that acknowledges social differentiation without exclusion, a need to accept difference *and* create mutual recognition and respect that transcends that difference. Nancy Fraser (2003) maintains that an adequate theory of justice must be three-dimensional. This entails redistribution of resources (the economic dimension), recognition (the cultural dimension of recognition of rights of diverse oppressed groups), and representation (the political dimension of democratic voice).

By shifting the argument onto issues of recognition, representation and redistribution, as a means of achieving inclusive union democracy, movement thinkers and activists have made such claims difficult to resist when they resonate so directly with core union values of democracy, rights and social justice. When these converge with the central material interests of unions in organising new workforces into membership as a means of renewal, and mobilising under the banner of collective solidarity, the combination is powerful and persuasive. The impact has been seen in the increasing readiness of unions to take up these arguments and make changes to their structures, rules and constitutions (see, for example, Colgan and Ledwith 2002a; Frege et al. 2004; Ledwith 2006a, 2006b).

Yet, as all counter-hegemonic movements know, such change is not achieved without considerable, effective, and continuous resistance and subversion of new inclusive measures (McBride 2001b; Colgan and Ledwith 2002a). Ardha Danieli illustrates this in her discussion of ways in which equality 'good sense' measures involving a theoretically coherent intellectual and reasoned ideology (in the case here, eliminating the democratic deficit in trade union government) become subverted through masculinised 'common sense' forms of resistance (2006: 336) as men withstand the incursions of women into the domain of the 'men's movement' (Franzway 2001: 109).

Nor do formal structural changes and electoral processes necessarily achieve the espoused outcomes. While the election of more women into union decision-making positions may achieve 'the numbers', women and diversity group members are not elected to represent women's/their diversity groups' interests; they are elected as a member of a particular category, not of a particular interest group (Cockburn 1995; Colgan and Ledwith 2000a) and cannot be expected, or relied on, to be movement activists committed to moving forward the counter-hegemonic process.

### **Empowerment**

This is where strategies of empowerment become significant. Empowerment has been described as the process of awareness and capacity-building which increases the participation and decision-making power of citizens, and which may potentially lead to transformative action which will change opportunity structures in an inclusive and equalising direction (Andersen and Siim 2000). Among women's groups, emotion and personal testimony have been important in both personal empowerment and feminist consciousness-raising. These also map onto wider social movement framing theory in which emotion, especially anger, has become recognised as integral to the framing process. Framing involves an intellectual account of injustice which legitimises the moral indignation and righteous anger directed towards the source of injustice and oppression, through which develop rationales and strategies for action (Hunt et al. 1994; Hercus 1999; Taylor 1999). In accounts of how and why women become active in their unions, social justice and gender injustice have been found to be powerful triggers (Colgan and Ledwith 1996; Healy and Kirton 2000; Ledwith 2000), and the more adversarial and exclusionary the experience, the more innovative and creative the response (Ledwith and Colgan 2002: 22).

Feminist movement thinkers (researchers) report practical evidence of the efficacy of empowerment processes, especially in sites of self or autonomous organising where not only are there mechanisms for developing



challenge and change to structures and hierarchies, but also opportunities for cultural change as despised or outgroups grasp the means of cultural expression to redefine a positive image of themselves (see variously, Young 1990; Kelly and Breinlinger 1996; Colgan and Ledwith 2000a; Parker 2003; Kirton and Healy 2004; Ledwith 2006b). The social processes involved in personal empowerment, consciousness development and in many cases, commitment to collective action, are captured in Paulo Freire's (1972) concept of 'conscientization'. Although his focus is on a collaborative *pedagogical* dialogue of learning and education through which the oppressed come to critically reflect on, and become radicalised, acting on their oppressive situation to transform it, it is also a paradigm for the broader politics of mobilising, in which education is pivotal (Ledwith 2006b).

## MOBILISING

Thinking of Fraser and Young's discussions of and insistence on an inclusive politics of difference, a model of effective mobilising must also include strategic alliances and coalition across and between diverse interest and identity groups – towards a social movement model. Armand Mauss's (1975) characterisation of a social movement as comprising three overlapping concentric rings can help in theorising gender and diversity mobilisation of the counter hegemony in labour movements. An outer ring of general sympathisers and sister-travellers provides support which, through existing coalitions and alliances, can mobilise at particular key junctures – like the broad women's movement which is always present in 'submerged networks' (Nash 2002) of belief systems, community and other groups and ready to act in particular circumstances. A second ring consists of movement members – those excluded and marginalised by labour movements, and willing to commit resources and legitimacy – and movement thinkers. The central core is made up of movement intellectuals and movement activists. These are vanguard leaders engaged as permanent persuaders.

Key here is 'transversal politics' (Yuval-Davis 1998). Transversal politics is a means of recognising that notwithstanding diversity and differences of class, sexuality, ethnicity and race, disability, age and so on, women also share a position of gender subordination and that there will also always be areas of commonality where their interests meet at a particular point of time, in struggle – a Gramscian 'compromise equilibrium' (Showstack Sassoon 1982). Thus women and diversity members from different constituencies may remain rooted in their own membership and identity, but simultaneously are prepared to shift into a position of exchange with those from different groups and group interests in pursuit of a common

agenda. This can be seen as a new form of deliberative democracy (Walby 2005), which can develop new political projects that cross and transcend old barriers. Such coalition ties into ideas and practices of women's community unionism, illustrating the strength of working across the range of interests and groupings, as appropriate, developing open systems, links and alliances, while ensuring that the central core, the vanguard of movement activists remains rooted in strong (and transforming) institutions of organised labour.

## CAN IT WORK?

So, is this a model that works? The evidence is that just as the women's movement has been the most successful social movement of modern times with its counter-hegemonic forces and ideas continuously gaining purchase and extending to a wider range of equity-seeking groups, this now maps onto, and into, the renewal of organised labour. A Gramscian model of gender praxis in the development of a counter hegemony geared towards a permanent revolution of inclusive democratic change in labour movements is emerging, I suggest, as an important contribution to trade union renewal and new forms of solidarity. At stake may be the future of organised labour.

## POSTSCRIPT: HOW CAN DEVELOPMENT OF A COUNTER HEGEMONY WORK IN PURSUIT OF A PERMANENT DEMOCRATIC FEMINIST REVOLUTION IN LABOUR ORGANISATIONS?

Thinking of some examples both in policy and practice, I draw here briefly on previous research and on a programme which is just beginning.

Changes in trade union policy towards gender and equality have been widespread, broadly in response to challenges from post-Second World War second-wave feminism and women's movements around the world, and gaining momentum at a critical moment at the momentous and historic UN Fourth World Conference on Women in 1995 in Beijing. From this global peak, and its Platform for Action, national and local political and labour movements, both before as well as since 1995, have moved to positions of recognition, representation and redistribution (Nancy Fraser's 3 Rs discussed on p. 276) through policies and practices of inclusion, which in many countries are also underpinned by legal frameworks on equalities.

In labour movements the UK public service union UNISON has probably developed the most comprehensive model characterising the 3 Rs. At its formation in 1993, its constitution centred on equality with a three-part approach which first combined *proportionality*: proportional gender representation in the elected union structures, with *fair representation* of the range of recognisable groups in the union (especially low-paid women, black members, lesbian, gay, bi-sexual and transgender, disabled). The third strand of UNISON's strategy was *self-organisation* of each of the four groups identified above, supported by a constitutional commitment to resource this radical new inclusive approach. This rule-book legitimacy spurred self-organisation into being the locus for significant development of counter hegemony and transformation in the union and has been a model for others (see, for example, Parker 2003; Kirton 2007). Research programmes have examined the UNISON prototype, leading to considerable debates about its efficacy, and discussion by feminist and other researchers of the political and social processes involved. See, for example, Colgan 1999; Colgan and Ledwith 1996, 2000a, 2000b, 2002a, 2002b; Mann et al. 1997; and McBride 2001a, 2001b. Fiona Colgan and I developed a model illustrating the significance of self-organising (SO) as a site for individual and group empowerment, development of strategies of social creativity and social change, a form of conscientisation, and ways of carrying these as collective actions into the mainstream to generate change (2002b: 175). While recognising that SO is both strongly contested and resisted in UNISON, and more widely in labour and political movements, and that numerically those involved are very much a minority, it nevertheless works as a place where movement intellectuals and movement activists can work together to develop and mobilise counter-hegemonic strategies. Some of these have been reported in published accounts of research with UNISON (mainly) women – see references above – and have also been fed back in reports to the union (Colgan and Ledwith 2000b) and UNISON women at regional and other conferences, education programmes and meetings – examples of feminist praxis by movement thinkers (researchers) working with movement activists.

Of course, plenty of other feminist movement thinkers have also been working with these sorts of ideas and practices, see especially Briskin (1993), Pocock (1997), Kirton (2007), Kirton and Healy (1999), Franzway (2001), Greene and Kirton (2002), Parker (2003), Hansen (2004) and Ledwith (2006a, 2006b) and continue to do so. Their analysis identifies and discusses the dangers as well as the pleasures involved. Suzanne Franzway discusses how sexual politics is necessary to subvert, reconfigure and challenge the dominant meanings and effects of labour institutions in both public and private (2001: 3), arguing that feminist politics in the trade

union movement ‘necessarily unsettles, disrupts and potentially overturns’ these (p. 15). And the need to try to maintain a balance between the autonomy of women and diversity self-organising and integration into the mainstream is theorised by Linda Briskin (1993, 1999), and illustrated by Briskin and many of those researchers already mentioned.

Now I am involved in new research, about union leadership, which builds on this learning and which I hope will continue to extend and develop these forms of feminist praxis. Funded by the UK’s Union Modernisation Fund,<sup>4</sup> the project straddles both union mainstream modernisation, and transformation for women and BME groups. Overall it ‘aims to develop existing and future leaders of the GFTU and its affiliated unions, who in turn will modernise and transform the unions’ cultures and structures to include, develop and empower women, and black and minority ethnic leaders’ (Ledwith and Jackson 2007). The project has been driven and informed by the evidence that although just over half of TUC trade union members are women, and members of BME groups have been increasingly joining unions, UK trade union leadership is overwhelmingly male and white, including in GFTU union affiliates. The resulting democratic diversity deficit in relation to gender and race/ethnicity, calls for new strategies for developing future leaders, especially from these under-represented groups, and for these leaders to undertake the modernisation of union structures and cultures. It also points to the need for modernisation of trade union leadership approaches more generally in relation to gender, race/ethnicity and diversity. The project aims to do this through a three-part programme. First, through participative research, to investigate and identify key modern leadership skills, knowledge and related issues, including those of gender and diversity. Second, to use the findings to provide the basis for a prototype for a multi-part leadership development programme for UK trade unionists. Third, to train a cadre of trainers to roll out the programme and continue to update it. The programme will provide the groundwork for the development of a sustainable programme of trade union leadership development within the GFTU and for the wider UK union movement (Ledwith and Jackson 2007).

This programme aims therefore to incorporate all four key aspects identified above in the development of an alternative and inclusive union democracy: formation of movement intellectuals, developments of arguments of social justice and equity, empowerment of the disadvantaged, and forms of mobilising. It will partly draw on the model of feminist praxis – where this chapter began, and in doing so will speak to the development of a strategy of counter hegemony and transformation in relation to trade union leadership. Leadership of labour movements remain deeply masculinised, hierarchical and exclusive (Briskin 2006; Ledwith and Cain 2007).

If trade unions are to move forwards in the project of renewal, this could be a long moment; a juncture where the will for renewal results in the formulation of new forms of union leadership.

## NOTES

- \* With thanks especially to Dr Lise Lotte Hansen, and to the Ruskin MA International Labour and Trade Union Studies students.
1. Hegemony is a cultural dynamic by which a group claims and sustains a leading position in social life through spontaneous consent, and thus legitimation, by the masses (Gramsci 1971). Establishing an alternative or counter hegemony requires a vanguard of intellectuals and political activists to organise around a political programme based on attracting different social forces and building new social relationships (ibid.).
  2. There is not space to consider this further here, but broadly, transformation can be seen as the 'longest (feminist) revolution' (Mitchell 1971) or Gramscian permanent revolution; revolution as process, involving evolving ideological, structural and cultural change towards an inclusionary democracy which recognises diversity rights, ensures proportional representation and redistributes union power and resources. A long agenda (Cockburn 1991; and see Ledwith and Colgan 2002).
  3. I use this term to include women who would not necessarily describe themselves as feminists (Colgan and Ledwith 1996), and male supporters, to denote those who nevertheless favour equality (probably liberal) measures and who are active in furthering gender equity and social justice.
  4. 'Trade union leadership development', to be carried out by General Federation of Trade Unions (GFTU), jointly with Ruskin College, Oxford. Union Modernisation Fund award 2007.

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## PART VI

### Equality and diversity interventions and change



## 22. Inclusion and diversity as an intercultural task

**José Pascal da Rocha**

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### INTRODUCTION

The debates on multiculturalism are developing in different directions, with different assumptions, tendencies and different value systems. Negotiation between diverse cultures and their daily side-by-side coexistence has become an intercultural challenge for any type of organizational, societal and managerial structure. Propelled by the effects of globalization, fluctuation of goods and persons, fast-spreading technology and general migration, scholars as well as practitioners face the new realities. It is no longer a question of 'if', but a matter of 'how' to adapt theories and practices of disciplines to the hybridity of people, societies and cultures. Nevertheless, many argue on the grounds of cultural relativism, that each culture maintains its own value system, that it cannot be understood from the outside perspective. Therefore, all cultures can equally claim their rights and identity. The right of self-determination is a status of principle. According to the cultural anthropologist Spiro and his theory of 'moral cultural relativism' (Spiro, 1993), equality becomes a matter of equal value, which renders any critique of cultural norms impossible. Thus, heterogeneity would follow and characterize the relationships between cultures. The issues at hand still remain: how does intercultural communication add up to diversity and inclusion? Where to place it in this relationship? How to assess it according to cultural relativism if the assumption is that any form of acculturation is deculturation?

### TOWARDS PLURALISM

Many European societies have adopted the realities of multiculturalism in their societal and organizational strategies.<sup>1</sup> Thus, multiculturalism is the practice of a multicultural lifestyle, a construct of Western academic theory, sustaining the principles of pluralism (see Greene 1992, 250–61).

The critiques of that concept are divided: Samuel Huntington states that multiculturalism is a source of weakness for his American society: 'A multicultural country with many civilizations is a country without any civilization and cultural center at all and as such doomed to vanish' (Huntington 1998, 305).

According to Leggewie, the hybrid mixture of all cultures stands for the power of the American dream (2000, 886). Michelle Wallace states that multiculturalism is certainly not paradise, but even in its most cynical and pragmatic form, multiculturalism has something worth living. Thus, there have to be ways to publicly manifest cultural diversity and pluralism and to integrate the input of the 'people of color' into the societal context (Wallace in Hall 2004, 191). The issues of this construction are at hand and they are normative ones: that is, whether all cultural practices are recognized as being equal (and at the same time the danger is to get entrapped in possibly inhumane practices in some cultures of the world such as slavery or genital mutilation of women in most parts of Eastern Africa), or we praise a single cultural and moral value valid for all, such as postulated by Huntington, or parts of the Marxist tradition or liberalism. The West itself is stumbling across a whole world of concepts trying to balance out this dilemma. While the Western world rejects ethno-centrism, it encourages it in non-Western cultures without a second thought (Abou 1995, 28). Yet, many scholars have pointed out that productive intercultural relations can only be formed with the help of a universally valid normative order (ibid., 29, 79–80, 83–85). Further, scholars do support the idea of cultural norms, without labeling them as cultural imperialism or even racism (Tibi 1995, 8).

## THE CONCEPTS OF POST-MODERNITY

A possible way out of the normative dead-end without being locked into cultural imperialism might be found with Charles Taylor and his book *Multiculturalism and 'The Politics of Recognition'* (1992). His starting-point was based on the concepts of Communitarianism and the prevailing disappointments of many scholars about John Rawls's liberal book *A Theory of Justice* (1971). The core of this book, which Rawls and others developed and which can also be found in 'The law of peoples' (Rawls 1993), is the sketch of a globally acceptable legal basis apt to guarantee a minimum of individual freedom, but with a strict neutral position of the state, that is, the authorities and other governmental institutions, for the particular identities of the people and their beliefs remain untouched. The primary demands of the citizens towards the states enclose so-called 'universal rights' to satisfy 'universal needs' such as a salary, medical care,

freedom of speech and religion, among others (Amy Gutmann in Taylor 1992, 4).

However, other particular rights should not be considered by the constituent. At the same time, Rawls excludes from the primary rights the positive freedoms at the core of human rights in order to avoid potential conflicts with non-Western cultural norms or the potential charge of neo-colonialism (1993, 36–68). Nevertheless, looking at today's realities and taking the example of women in reformed Morocco, Rawls's model fails to stand the test and to offer practical utility in two major areas: first, with respect to a man's infinite possibilities of turning a woman out of his house; second, with respect to women's financial compensations for agreeing to a polygamous family life. In fact, the model does not even indicate which direction the position of women in Morocco (90 per cent are illiterate) might take. Yet, for Rawls, it is the different cultural and political value systems that maintain primary validity. On the other hand, Taylor suggests that the 'primary needs' or 'primary rights' entail not only the supply of economical and judicial resources, but also the recognition of the individual through the cultural society as a primary, positive right (Taylor 1992, 26; see also Kymlicka 1989, 166). A substantial 'Self', a personality with self-confidence and an 'I-identity' can only be reached through the interaction with significant others (Mead 1962). Only if we start looking at ourselves through others' eyes, will we learn who we 'really' are; only through identification with others can we appreciate what should be and what should not. The Self is constituted through the dialogue with the significant other – not only at the beginning, but throughout the whole life, even if the 'Other' disappears from our life (Taylor 1992, 33). Only through recognition from the cultural group and society can the Self gain identity. Therefore, the state is in the line of duty to defend and protect marginalized cultures, groups and minorities, against the oppression by the majority culture or titular nation (*ibid.* 43; see also Amy Gutmann in Taylor 1992, 5). Equality should not be dictated, or imposed, but rather the right to be different should be postulated, protected and sustained by governmental bodies and agencies. In an organization such as an economic entity, space should be negotiated for the interaction, development and formation of individuals, and the valorization of this space should stand at the core of executive policies.

Yet, there are issues with such concepts if they are tested against the realities of the various cultural contents. Taylor's solution is based on the premises of liberalism (Taylor 1992, 63). Liberalism cannot offer neutralities in which all cultures can meet and coexist and it cannot and must not provide cultural neutrality. Liberalism has to define boundaries and clarify what can be public and what belongs to the private sphere. This

is especially applicable to politics and religion. Unwillingly, we tend to drown in the mainstream debate of multiculturalism and constructions of conflicts between the Christian civilized world and Islam, where some authors even argue the lack of an equivalent to the Age of Enlightenment (see Tiel 1998, 223).

Another solution provided by Taylor in order to mediate the different types of conflicts in the concepts of multiculturalism with a perspective on liberalism is tolerance. 'Tolerance' itself is a vague term; although *en vogue* in Western concepts of multiculturalism, it lacks a productive foundation. Scholars still have to determine to what extent tolerance is a justifiable response to intolerant and aggressive behavior. In the context of the intercultural conflict of values, tolerance and respect fail as normative guidelines, both in the public and private spheres. To practice tolerance and respect requires reciprocity as well as the development of a shared horizon of values that allows for a precise definition and critical assessment of the boundaries of these concepts. In this regard, also, Taylor did not provide a convincing answer (see Kuper 1999, 236–7). Equally, this poses important questions for the concepts of diversity, equality and inclusion within an organization: if such core concepts are communicated by leadership and at a higher level of the organizational hierarchy, these concepts become not only strategic but also political. For instance, tolerance proves to be useless as well as detrimental if merely employed as a political catchword, similar to solidarity, which is also the narrative used by political leaders.

For post-modernists (for example, Maxwell 1994), the concept of culture is an exclusively pluralist one (see Kuper 1999, 23–46, 59–63). Yet the valorization of cultural diversity in the sense of a radical equality of all cultures, and even subcultures, prevents any form of critical engagement, thus contradicting the notions of a universally valid reason or a binding ethical norm. Returning to Taylor's concept of recognition, he strongly argues for an assumption of equality of all cultures. If recognition is a primary right protected by rights and having the same level of protection such as the guarantee of human rights, then it is a breach of human rights and of justice, if a majority culture or the titular nation does not recognize the minority culture as equivalent in rights or as (a) rightholder(s) (Taylor 1992, 66). But even this assumption has to be justified and transparent and be the object of hermeneutical findings. Taylor refers to Gadamer's *Wahrheit und Methode* (1960). Briefly, this concept starts with the understanding of values and beliefs of another culture. What is important for the 'Other' has to be understood by one's 'self'. Acceptance and tolerance lead to a shift in perspectives and comprehension of the Other's system, and one's own values are being re-evaluated. The ideal stage is when both horizons and comprehension merge into one another. The new acquired

perspective not only changes the apprehension of a value of a culture upon another culture, but also tends to another understanding of institutions and systemic powers as already elaborated by Michel Foucault (1977) and his discourse theory. Taylor's concept is still arguable as he firmly divorces himself from Communitarianism (see Etzioni 1996). However, his strong support of Liberalism and concept of a 'good life' is its weakness as well, and puts him unwillingly in the line of Euro-centrism, essentialism and cultural relativism. Yet the question still remains on how to assess the validity of culture in the post-modern society. Seen from a comparative perspective, there are two criteria: first, which culture provides better protection for the basic existential needs of human beings (this includes Rawls's 'primary goods') and, second, which culture provides better opportunities to realize the 'good life', a concept started by Taylor and picked up and developed by other learned scholars (see Sen's 'capability set' 1999, 74–110; Nussbaum's '*Gerechtigkeit*', 1997, 187–226). The implication of an institutionalization of cultures leads to a freezing of cultural differences and a reifying of cultural 'communities'. The trouble with multiculturalism is that it imposes concepts of membership in collectivities that are defined by their 'cultures', and it construes such membership as the basis of collective rights.

Appiah (1994, 169) argues that the collective dimensions of identity provide people with narratives of personhood and life scripts, and he argues for a much closer concept to a transcultural socio-political space shaped by Cosmopolitanism. According to Appiah, Cosmopolitanism stands for the world citizen, the person who is not subject to such constructions as 'diversity', 'difference' or 'in-/out-group'. It advocates for another approach in today's reality of globalization: every person, every market, every metropolis is accessible, anytime, anywhere, emotionally, intellectually and physically (p. 101). Everything is integrated, thus it does not belong to a specific Western or even Chinese concept. In this sense, human variety matters because people are entitled to options and strategies to shape their lives and relationships with others (p. 104). This concept reveals a variety of views. For instance, some argue for community among all humans, regardless of their social and political affiliation. Others argue for the share of a moral community. Yet others conceptualize the universal community in terms of political institutions to be shared by all. In recent philosophical literature, the cosmopolitan encourages cultural diversity and appreciates mixtures, yet he/she rejects nationalism and nation-state narrative in media. Waldron (1992), for instance, states that Cosmopolitanism can acknowledge culture as a societal linkage between humans, while at the same time denying that this would logically imply that a person's cultural identity should be defined by homogeneous



cultural assets. Cultural purity is an oxymoron as it defies today's reality, and cultural aspects specific to one cultural unit cannot be imposed upon or assumed for another cultural unit.

As seen in the above, elaborations on the concepts of culture, difference and equality do not really seem to present an open door, suggesting possible solutions for reaching diversity and inclusion. Yet, these elaborations are useful and helpful in their basic conceptions, as they all hold validity, correlations and interdisciplinary value for a comparative approach to solutions, whether at the domestic level or in the organizational hierarchy. Thus, I should like to advocate that the center of gravity for any debate on diversity, equality and inclusion should start with the person, the individual, without, in a first step, taking into account his (or her) background, values and culture, which is a construction of both his own interests and his environment. This also means that, say, the manager in the human resources department, should interview individuals not only with regard to the position that needs to be filled or some politics of diversity from the corporation leaders, but to take the concept of personhood as the basic starting-point, to see the person first, then his/her possible contribution to the workforce. Martha C. Nussbaum proposes a 'conception of person' grounded in 'central human capabilities' (1997, 190). While accepting the validity of some of Rawls's 'primary goods', Nussbaum considers the opportunity to make full individual use of these primary goods – rather than human rights (as guaranteed by the constitution) – as a prerequisite for a 'good human life' defined as the opportunity to develop into 'full personhood'. To prevent someone from utilizing these primary goods is tantamount to preventing him/her from fully achieving 'personhood' and thus disregards human 'autonomy, dignity, and emotional well being' (ibid., 204). Nussbaum (following Aristotle) argues empirically, basing the validity of her concept of personhood on the self-interpretations of different cultures as they manifest themselves in 'myths and tales'.

## THE CONCEPTS OF POST-STRUCTURALISM

Addressing the term 'inequality', the literature shows an abundant number of theories, research, roots and causes of inequality and the problem for gender diversity and gender equality (for example, Orloff, 1993; McCall, 2000). In the context of the social concepts of Cosmopolitanism and hybridity, I shall now recall less rigid binary approaches that can be applied to gender pluralism. From the exhaustive literature, a brief mention will be made of various theories and approaches to (liberal, critical) feminism, masculinity studies, post-structuralist approaches and queer theory.

Liberal feminism stems from 18th- and 19th-century thinking regarding individual equal rights (Tong 1998, 10). It involves a focus on achieving equal rights via reform, particularly in the public sphere (Beasley 1999, 51–2). There is an emphasis on the rights of the individual, limited state intervention and freedom from prejudice (*ibid.*, 52). Liberal feminism can be used as a basis for developing a politics of sexual and gender diversity. According to Monro (2005, 24), the emphasis is on individual rights and it proves to be useful for supporting diversity. The issue with the liberal approach is the rationalism of the collective nature of politics involved, linked to masculine subjectivities. From this issue, radical feminism evolved, indicating causes and roots of sexual oppression and other forms of power as purely coming out of social systems of male domination. Thus, men as a group are considered to be the beneficiaries of this systemic and systematic form of power (Beasley 1999, 55). Marxist feminism also extends modeled sexual oppression as an aspect of class power just as socialist feminism evolved at the intersections between radical and Marxist feminism and involves various approaches with combined strands of thinking. With linkage to psychoanalytic feminism, these theories discuss the psychological processes that lead to the formation of women as different from men. French feminists such as Kristeva (1985) draw on Jacques Lacan (1988), linking unconscious mental phenomena with the construction of feminity at both social and psychological levels. For Lacan, the self and sexuality are socially constructed via language – a very useful theory. Prosser (1998) and More (1999) discuss accounts of transgender that draw on psychoanalysis. Black and white feminism give rise to further approaches and theories (see Davis 1981). With a linkage to post-colonialism, Spivak (1987) examines how racism operates to construct racial boundaries, which continue to organize both the colonialization of indigenous peoples and the black/ethnic/‘diaspora’ communities.

Other studies address the issue of masculinity, ranging from conservative and mythopoetic to pro-feminist and post-modern perspectives (see Monro 2005). Post-structuralist approaches deconstruct not only rigid gender roles, but also notions of ‘male’ and ‘female’. Post-structuralism is, along with post-colonialism and post-modernism, a theory which argues that subjectivity is socially constructed, contradictory and fragile, and it rejects the notion of an underlying ‘reality’. Instead, reality is seen as constructed via the exclusion of ‘others’ or other options (Beasley 1999). Post-structuralist theory provides important tools for understanding gender diversity. In her work on gender politics, Monro (2005) contributes useful theories regarding application fields and limitations of the post-structuralist approach, the strongest critique being an overemphasis on construction, though the nature of identity does not necessarily have

to be constructed in the way that post-structuralism assumes. The last approach in the field of gender theories is queer theory, which has been discussed in gay and lesbian academic work in the area of literary and cultural studies. Its roots mainly depart from post-structuralism with its strong linkages to the work of Foucault (1977). According to Sedgwick (1991), queer theory deconstructs gender and sexual identities, primarily through the interpretation of the cultural text. Finally, queer theory can be a useful counterpart to rigid post-structuralism and it can support multiplicity (see Butler 1990 for further details).

All these theories provide the basic tools for an interdisciplinary approach to gender diversity in economic entities. Gender pluralism and transsexuality form the new framework for debates on gender, diversity and inclusion. Yet, the most promising results for qualitative and quantitative data on inequality would be gathered from the assumption that modern inequality has both a gendered and a racial character. McCall (1998) addresses these issues through an investigation of the social composition of inequality – including gender, racial and class dimensions. Therefore the politics of gender and diversity has an effect on policy strategies. The transition to the service economy, job-sharing, loss of job security and relativity of workforce value do have implications, which re-emerge in the social and cultural concepts of ‘center’ and ‘periphery’, thus closing the interdisciplinary circle from social and cultural concepts to economic issues and back to concepts of power, ‘otherness’ and ‘personhood’.

The current Western emphasis on the concept of personhood is related to the fact that philosophers as well as cultural critics and historians have moved the notion of ‘virtue’ to center-stage in their discussion of values. At the same time, the term ‘character’, neglected since the rise of Modernism, has gained importance in literary criticism, psychology, and ethics, especially in connection with an ‘ethical attitude’ and (especially since Jean-Paul Sartre) the existential personal decision. J. Melvin Woody comes to the conclusion that ‘freedom’ is meaningless without ‘integrity of character’: ‘freedom of choice’ and ‘character’ are two sides of the same coin (1998, 305). Peter Frederick Strawson (1992) similarly insists on an intersubjective aspect inherent in the concept of personhood, defining a person as someone who acknowledges other people as persons and vice versa. The concept of personhood is thus a reciprocally relational term.

## ENGAGING THE ‘OTHER’

Intercultural negotiations demand a new kind of theory, thinking and acting, namely, bifocal thinking as social practice (see also Geertz’s

(1973) 'bifocal understanding' and 'cross-traveling' and Hall's (2004) 'bifocal perspective'). Only by employing a dialectical discourse – that is, by adopting each other's perspectives – can culturally specific and hence different modes of subjectivity and discourses be reintegrated into an 'inter-discourse' without subjecting the culturally competing elements to a new master discourse (for example, Appiah 1996). The objective must be translation and transition and certainly not homogenization. Translation, however, is apt to produce misunderstandings; as the old dictum goes, *traduttore traditore* (translators are traitors). This is all the more true of intercultural translations, in which difficulties in understanding semantic and cultural codes add up and multiply (Clifford 1999, 6, 36–8, 41–2, 182–5). Moreover, translation is often interpretation. Transition demands transcultural awareness and sensibility and contextual situatedness. Mediators have the tools, capabilities and capacities to support and foster translation and transition. Mediators (practitioners, multipliers of all sorts as well as media) build bridges, yet they also create new obstacles. At best, they help us to familiarize ourselves with and adopt the foreign, without, however, removing its foreign quality; at the same time, they also throw into relief our own irreducibly foreign quality in encountering the 'Other'. Without drawing on Foucault's archeological methods, and without a large-scale intercultural cooperation, such a dialogue cannot be realized.

## CONCLUSION

The constant flux of changes and asymmetric contexts renders new assumptions on the negotiations of relationships, intercultural communication and day-to-day life and business. The intercultural approach functions by taking into account three levels of system, the personal, the structural, and the cultural, and the process of interculturality occurs by focusing on three levels of action: 'de-centring', understanding the other's system, and negotiation between the systems. The concept of personhood and capability used as a de-constructing method of nationhood narratives and the use of post-structuralist approaches certainly help organizations, societies and individuals to build a knowledge management system, making it possible to share values and to benefit from those shared values. The most important asset and focus on investment for a company should certainly be the human factor. Understanding and engaging the human factor is paramount for a prospering organizational culture. Thus, the merging points of the different cultures can be taken into account by a focused diversity management program, based on the aforementioned

theoretical foundations. The intercultural and diverse encounters fill up a space with constructive potentials for every CEO. Further research should focus on developing the concept of personhood, as it proves to be a valid ethical guideline within the corporate world.

## NOTE

1. See [www.euractiv.com/fr/europe-sociale/commentaire-assimilation-francaise-multiculturalisme-anglais-modele-integration-europe/article-148250](http://www.euractiv.com/fr/europe-sociale/commentaire-assimilation-francaise-multiculturalisme-anglais-modele-integration-europe/article-148250), accessed 15 July 2007.

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## 23. Partners in policy: academic–practitioner collaboration for equity in education and skills training

**Mary Gatta**

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### INTRODUCTION

For centuries, US public policy has been infused with gender beliefs<sup>1</sup> and assumptions that have served to create and maintain existing structures of inequality between men and women. As a result, gender is an implicit and explicit structuring principle of past and contemporary policy. Be it military policy, health policy, reproductive policy, or virtually any other policy arena, constructions of socially appropriate gender paradigm continue to influence policy throughout the United States. At times this influence can be quite clear – such as controlling women’s ability and choice to have children via abortion rights or forced sterilization. At other times the gendered notions are more implicit, such as building on hyper-masculinity and manliness to justify sending men (and not women) to the front lines of war. Yet it is not just that conceptualizations of masculinity and femininity underlie public policy; the actual impacts of policies can differentially affect men and women. Forced work requirements as a condition for welfare, for example, can adversely affect women more than men, as women tend to bear the brunt of family’s unpaid caring labor. As such, childcare and eldercare demands often make it difficult for women to work in the paid labor force in the first place, pushing them into poverty and necessitating social welfare. By understanding how gendered notions of caring work impact on women’s lives, it then stands to reason that simply forcing them into work will not raise them out of poverty.

In this chapter I demonstrate the importance of understanding public policy with a gendered lens. Yet it is not enough to just acknowledge that public policy is gendered. In addition, we must proactively craft and evaluate policies in ways that understand the gendered impacts. In doing so,



public policy can serve as a powerful tool to address equity issues. Central to this, I believe, is that policy makers must collaborate with gender equity scholars to understand both the underlying gender assumptions of policy, and the gendered impacts of public programs that flow from those policies. Although this is not an easy task, we can locate inroads to begin this dialogue with an examination of an innovative job training program in the United States that integrated gender equity scholars into the policy process to help provide single working poor mothers with access to education in their homes via the Internet.

## ONLINE LEARNING FOR SINGLE WORKING POOR MOTHERS

In 2001, the US Department of Labor selected the state of New Jersey for a demonstration program using online learning and the Internet to upgrade the skills and earnings of single mothers employed full-time in low wage jobs (for a detailed analysis of this program, see Gatta 2005). The federal government wanted to establish a project that would demonstrate whether online learning, which has proven effective in developing the skills of college-educated workers, would be effective with the less-educated population of low-wage workers. Eligibility for the program was set by these agencies to include single mothers with at least one child (under the age of 17 years) at home. The single mother needed to be employed full-time and earn an income below 250 percent of the poverty line in 2001, or \$43,700 annual household income. Once accepted into the program she received a computer, Internet access, and courses for a year.

There was much that was exciting about this project. Online learning offered potential advantages to the women in the skills training program and their families that are not available in traditional settings. Most notably, online learning provided flexibility in time and space. Students learn at their own pace, in their homes or virtually anywhere, and attend classes when they can fit them into their schedules – taking classes at any hour or any day of the week. Further, online learning is cost effective, as participants save money and time in childcare and commuting when they receive skills training via technology in their home.

Indeed, the demonstration project proved to be highly successful. The program had a very high retention rate – 92 percent of the women completed the year-long program, an exceptionally high proportion for this (or any) population. All of the women remained employed over the entire

period from the start of their program through the end of 2003, despite the fact that this was a period of rising unemployment for single working poor mothers. The national unemployment rate for this population group was over 9 percent in 2003. An analysis of social security wage data for program participants found a 14 percent average increase in earnings, nearly \$2,400, in the year that elapsed between the beginning and end of 2003 – a period of stagnant earnings nationally for this population group. Finally almost 15 percent of the women pursued further education – either at a community college or a university – at the conclusion of the demonstration project.

While the results of this project are impressive and served to inform job training policy in the United States, there is also another narrative that is equally intriguing: state policy officials collaborated with gender equity researchers at the Center for Women and Work, Rutgers University to design and implement this policy. Researchers were integrated into the policy process, and helped to shape the policy intervention. Gender equity researchers were able to partner in the policy process to advance a progressive and feminist agenda into state policy. As a result of the partnership, it was possible to craft the New Jersey demonstration project using an equity approach – taking gender, along with race, class and marital status into account.

Most significantly this project was able to bring the issues and challenges that working poor women face in their daily lives into the forefront of policy discussions. It acknowledged explicitly that women face a distinct set of demands that differ from those facing men, due in large measure to the unpaid labor they perform. Women still bear the brunt of home and domestic responsibilities and, as a result, face barriers that are different from those facing men, and they are differentially affected by state and federal policies. The New Jersey program also acknowledged the difficulties that working-class women, especially women of color, have often faced in traditional classroom settings and in their relationships with teachers and school officials. Indeed the policy was implemented in a way that demonstrated that sociological variables matter and impact on individuals' lives.

The academic–practitioner partnership also allowed the state to better tailor the program to address poor women's needs. As the demonstration project unfolded, the lives of working poor women, usually ignored or marginalized in discussions at the policy table, took center-stage. The relevant question became how to fit education and skills training into women's lives, not how women could fit themselves into education and skills training programs. Yet this was only able to occur because gender equity experts were integrated into the policy process itself.

## SUCCESS OF THE COLLABORATION

The academic–practitioner partnership on this project began when the New Jersey Department of Labor and Workforce Development (NJDOLWD) contracted with gender equity researchers at the Rutgers University Center for Women and Work to determine ways to best implement the program and to conduct an evaluation that would allow department officials to quickly respond to any problems that arose.<sup>2</sup> Central to this was that the evaluation research was not conducted at arm’s length. Instead, researchers shared the features of the program which were working and those which were not, along with strategies to remedy them. This allowed not only for the quick responses on the part of state officials, but also a more effective job training program for the single mothers enrolled. For example, early on in the program it became clear that a motivating factor for participants was that their children would have access to computers and the Internet in their home. As such, the state loaded the computers with children’s software to help encourage their children to avail themselves of the opportunity to use the computer. Moreover, state officials integrated the women’s children into the program as much as possible, for instance, providing a holiday ‘get-together’ for the women and their children complete with a Santa Claus providing each child with a gift. The integration of the children into the job training program allowed for a more inclusive conceptualization of the women’s lives, as they were viewed as workers, students, and mothers.

The evaluation further provided the federal and state agencies involved in the program with an assessment of its effectiveness. The program was designed to eliminate or significantly reduce key obstacles that single mothers face in traditional educational settings. The barriers that single poor working mothers typically face with respect to transportation, childcare, irregular work schedules, and not having the desired classes available close by were explicitly addressed in formulating the program. In addition, NJDOLWD officials asked the Rutgers University researchers to identify barriers women face in online learning programs to ensure that the state’s demonstration project has in place strategies to address them. These barriers include participants’ feelings of isolation, lack of facility with computers and the Internet, difficulty dealing with problems that arise with the technology, and problems finding time in one’s day to take classes.

Working in collaboration, the Rutgers University gender policy researchers and state policy officials designed mechanisms within the program to help alleviate these problems. The program set up monthly in-person support groups that met at the local One-Stop Center<sup>3</sup> so that

participants could connect in person with other participants and instructors, and could think of themselves as a learning community and feel comfortable e-mailing each other with questions and comments about the program or the course material. These group meetings were held outside of normal business hours – at nights and on weekends – and were scheduled around the women’s busy schedules. They covered topics ranging from how to search the Internet to find discount coupons or holiday recipes to how to prepare a résumé or use the Internet to conduct a job search. The One-Stop Centers provided childcare at these monthly meetings so the women could bring their children along. The program also helped bridge the knowledge gap between participants and commercial ‘help desks’ provided by computer and software companies by providing technology help at the One-Stop Centers by staff accustomed to working with this population. Finally, job coaches at the One-Stop Centers worked with the women on time management skills to help them find time in their days to complete the required work.

The partnership between the gender equity experts at the Center for Women and Work and New Jersey workforce development officials allowed the Rutgers University researchers to inform the policy decisions that were made so that they better served single mothers’ education and job training needs. It helped policy officials to acknowledge that neither poverty nor workforce development policies are gender or race neutral, and to admit that the workforce system has faced significant difficulties in delivering training to single working poor mothers. Moreover, NJDOLWD acknowledged that employment is not enough to raise women out of poverty, that the workforce development system must provide working poor women with opportunities for education and training, and that programs and policy must be flexible to meet women’s needs as workers and caregivers.

## **FUTURE DIRECTIONS FOR ACADEMIC– PRACTITIONER COLLABORATIONS**

Groups that have been excluded from traditional occupational skills training and education programs extend far beyond working poor single mothers and include other working poor women and men, unemployed young people who dropped out of high school, people with disabilities, residents of rural areas, immigrants, and currently employed workers whose skills are being made obsolete by technology and/or outsourcing among others. Innovative use of technology to make training flexible in time and space and collaborations or partnerships among workforce

development policy officials, academic researchers, community groups, business and labor to develop programs that meet the specific needs of particular population groups are the keys to making training policy inclusive.

The promise of information technology in this arena is that it makes it cost effective for state workforce development agencies to customize training programs to be flexible in time and space. This opens up the possibility that workforce development programs can be devised that meet the diverse needs of population groups usually excluded from training on the grounds that they are 'hard to serve'. In particular, this technology makes it possible for training policy officials to develop programs to meet the needs of workers at various transition points over the life cycle – school-to-work, reentry after time out for childcare or other care responsibilities, transition from unemployment to employment, and so on. As the New Jersey program demonstrates, such an approach can put previously marginalized workers on a trajectory that will lift them out of the ranks of the working poor and enable them to cross over the poverty line and onto a path to economic self-sufficiency.

However, the innovative aspect of this program extends beyond the use of technology. The key to the success of the New Jersey project is the collaboration of training policy officials with academic researchers who view training policy through an intersectional lens and with community organizations, educational institutions, employers, and labor unions to craft training programs around the lives of people who participate in them. This program demonstrates the potential of collaborative partnerships between university researchers and state policy officials. The uniqueness of this partnership was that academic researchers took an unaccustomed role in the policy arena and moved beyond simply supplying labor market information and/or conducting evaluations of workforce programs. This project provided opportunities for researchers and policy makers to collaborate in order to move forward a new workforce development policy agenda to address issues of gender equity. In doing so this project demonstrated that we must move beyond just considering that research can be used by policy officials to understand the different levels at which research can influence the policy process. This innovative approach to workforce development policy allows for new frameworks to be introduced within the policy makers' worlds. Not only must boundaries be crossed that help to provide access to education and skills training to previously marginalized and excluded groups, but researchers and practitioners must cross occupational boundaries to craft innovative public policies to address society's equity needs.

## NOTES

1. While the focus of this chapter is on gender, it is important to note that gender is not the only variable that is central to public policy. Other variables including race, ethnicity, immigrant status, marital status, geographic location, along with the intersections of them underlie the construction and implementation of public policy.
2. The NJDOLWD was aware of the researchers at the Center for Women and Work because Center researchers had staffed the Department's Council on Gender Parity in Labor and Education for several years (see Gatta, 2006).
3. A One-Stop Center is a physical place mandated by the Workforce Investment Act, federal employment and training legislation for the United States. At a One-Stop Center (which exists in all 50 states) individuals can access core services (job search and placement assistance, labor market information, initial assessment of skills and needs) on-site, and information about and access to all publicly subsidized job training, education and placement services is available.

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## 24. Putting words in our mouths: diversity training as heteroglossic organisational spaces

**Elaine Swan**

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### INTRODUCTION

Diversity management in the workplace have been increasingly examined in organisation studies in the past 10 years (see for example, Prasad and Mills, 1997; Kirton and Greene, 2000; Lorbiecki, 2001; Ahmed et al., 2006; Konrad et al., 2006). Diversity training, however, although a quintessential intervention in diversity management, has been much less theorised and researched by organisational theorists. There is some academic literature on equal opportunities training and anti-racist training from the 1980s, but this dates before the new equalities regime in the UK and the turn to diversity in the UK (see, for example, MacDonald et al., 1989; Brown and Lawton, 1991). Maybe on reflection this relative lack of attention is not so surprising: so-called ‘soft skills’ training *per se* is often denigrated by managers and academics on a range of counts.

In fact, diversity training is even more likely to generate hostile reactions from managers, staff and academics than traditional soft skills training. This is for a range of reasons. Some of it is the ‘heat and noise’ that still emanates from people’s experiences or myths of the 1980s race awareness training run by local authorities and public bodies in the UK (Brown and Lawton, 1991). Critiqued by left and right, by white recipients and black activists, this form of training was seen by many to lead to cynical ‘white breast beating and learning the right rhetoric’ (Gaine, 1995: 128). Its particular pedagogical style of experiential learning and confrontation was seen as a ‘perverse lust for guilt and the ritual cleansing of exposure’ together with ‘wallowing in white middle class guilt’ (Brown and Lawton, 1991: 26). There were also serious concerns about the way such training had resulted in teachers neglecting marginalized white working-class issues within schools after the fatal stabbing of Ahmed Iqbal Ullah by a white pupil in a Manchester school in 1986 (MacDonald et al., 1989).

This negative legacy still hangs around diversity training. In particular, diversity training is seen to be about producing a highly charged space by generating anger, defensiveness and guilt. These emotions are imagined to be unproductive, unnecessary and inappropriate. As a result, diversity training has tried to develop a more 'softly, softly' pedagogical style (Taylor et al., 1997).

Another reason for the dislike of diversity training is its imagined 'preaching' and policing of freedom of speech. These were often glossed as 'political correctness': a pejorative 'catch-all' term used to denigrate equalities and diversity policies aimed at regulating relationships and practices in the workplace, including controlling the use of certain racist, sexist and homophobic terms of abuse and hate speech (Penketh, 2000). Political correctness was seen by the right as a 'fanatical activity of the far-Left . . . a mix of extremist egalitarian doctrines such as feminism, anti-racism and multiculturalism . . . deeply threatening to social cohesion' (Younge, 2000 cited in Penketh, 2000: 125). And by certain quarters of the left it was taken to be a new form of workplace control and a denial of freedom of speech. On the training courses I researched which I discuss later, participants spoke of having 'it all shoved down our throats'. Much of the criticism of equalities and diversity involved a fear of freedom of expression.

For academics of equality, diversity training is also highly problematic. Important questions have been raised about the way diversity training has been seen as a policy panacea attempting to address inequality, racism and discrimination (Rowe and Garland, 2007). For example, a recent text asks whether police diversity training post-Macpherson is a 'silver-bullet tarnished' (Rowe and Garland, 2007). Questions have been asked about whether you can achieve 'attitude change through workshopping' (Lasch-Quinn, 2002: 166). For others, diversity training has led to a 'backlash, white rage . . . as well as a sense of frustration and disappointment from women and minority ethnic groups who feel that diversity has failed to deliver' (Lorbiecki, 2001: 354). Overall, diversity training is imagined to be a politically less radical intervention compared to equal opportunities training and anti-racist training (Kirton and Greene, 2000). Typically, it is viewed as a 'ticking the box' activity, done by organisations in order to comply with the new equalities regime, the subject of the latest flavour of the month (Rowe and Garland, 2007). This has led to increasing cynicism from potential trainees (ibid.). Importantly, a few commentators have pointed to some of the positive effects of diversity training. It has been seen as bringing racial tensions and gender conflicts to the surface (Lorbiecki, 2001) and some workplace changes, for example, in the police (Rowe and Garland, 2007).



In essence, though, the relative dearth of theories and empirical accounts of diversity training could be seen as somewhat surprising on two counts. The first is the emphasis on diversity training within policy development as a response to the new equalities regime (Penketh, 2000; Bhavnani, 2001). Hence, in recent UK policy, training has been seen as one of the major problems in relation to institutional racism in public institutions and also one of its most promising solutions (Penketh, 2000). Thus, the Macpherson (1999) report into the murder of Stephen Lawrence and the institutional racism of the police made seven recommendations for race awareness and cultural diversity training for the police. Second, there has been an exponential rise in the skills training and consultancy industry, including diversity training. Several theorists argue that a subdivision of this consultancy industry involves a focus on diversity and equality, and is a growing field of power, involving a highly influential network of organisations, consultancies, agencies, policy makers, business schools and authors (Lynch, 2002; Jack and Lorbiecki, 2003; Swan 2004).

This chapter starts to address this relative gap by exploring the practice of diversity training in the UK. In particular, it argues that diversity and diversity training have been represented as a rather singular phenomenon. Thus, where diversity training is referred to it is represented as a fairly standard, monologic, universal practice with a predictable teleology. This is imagined to be the case in spite of variation in its aims, activities, pedagogical approach and ideas. In contrast, the chapter suggests, building on previous empirical work that diversity can be understood as a highly heterogeneous practice: with contradictions and differences in both production and effects (Lorbiecki, 2001; Omanovic, 2006; Hunter and Swan, 2007). In particular this work asks what does diversity as a concept and set of practices actually 'do' in the workplace (Ahmed et al., 2006).

In similar vein, I have argued elsewhere that interpersonal skills training in the workplace such as personal development, influencing skills, assertiveness and so on are forms of bricolage, in which highly diverse, and contradictory discourses and technologies are drawn upon (Swan, 2004, forthcoming). I argue that diversity training is not an exception to this kind of bricolage but in fact draws upon its own highly particularistic range of diverse sources, genres, languages and rhetorics. Drawing on the work of Russian philosopher and literary theorist, Mikhail Bakhtin, I argue that diversity training should be understood as 'heteroglossic' in the sense of comprising multiple ideas, voices and politics. As such it may not represent the singular, de-radicalised or closed event that diversity academics and organisational theorists often take it to be. This is not to suggest that diversity training is a new civic space of equality and progressivism, but to argue that diversity training need not be understood as self-contained,

closed and completed. To start to address some of these issues, the next section provides a brief history on diversity training; the chapter then outlines key ideas within Bakhtin's work, and the final section applies these to recent empirical work on diversity training.

## DIVERSITY OF DIVERSITY TRAINING

Equalities and diversity training in the workplace has been a central plank in many policy and organisational approaches to equality issues since the 1970s in the UK. This training has been motivated by different aims, content and pedagogies. This type of training was first offered in the 1970s to line managers in the private and public sectors, civil servants, trade union officials and shop stewards; more recently, diversity training has also been aimed at front-line staff in the public and private sectors (Wrench, 2002). Recent research suggests that diversity training is usually aimed at full-time, permanent core staff and often front-line customer-facing and lower-level staff rather than senior management (Creed, 2006). Creed argues that senior managers can 'exempt' themselves due to power even when diversity training is compulsory, and that this raises important issues about class and diversity training and demonstrating how diversity gets marginalised.

There have been different approaches to diversity management in Europe and the US. Discussing the US, Anna Lorbiecki and Gavin Jack (2000) outline a number of different phases of diversity management. They suggest that the first phase was demographic. This was influenced by the publication of *Workforce 2000* and the changing demographics of the US labour market, and led practitioners and academics to develop the practice of diversity management. The second phase is more political and represents the acknowledgement by practitioners and academics that diversity management was potentially more de-politicised and conservative than affirmative action. The economic phase in the 1990s refers to the business case view of diversity in which it is understood to be of economic benefit to organisations. In the US, by 1998 a diversity programme was being undertaken by 75 per cent of the Fortune 500 companies (Wrench, 2002). The current phase is more critical of diversity management in their view due to the problems and criticisms of diversity management from practitioners and academics.

The original shift from equal opportunities to diversity management was seen as a way of going 'beyond' what was seen by some as the narrow sectarianism of equal opportunities, and anti-racism. Referred to as 'beyond race and gender' by Thomas Cox, the leading influential

'academic-consultant' in North America on diversity in the 1990s, it was seen to broaden out to include all the ways in which individuals differ, for example, personality and work style: thus offering less 'fractious' analytical categories than race (Mir et al., 2006: 171). It seemed to offer a more celebratory narrative of a multicultural workplace (Mir et al., 2006) which included white men and was therefore imagined to be more sustainable. As Pushkala Prasad and Albert J. Mills (1997) suggest, this growing 'diversity industry' seemed to offer a more upbeat, happy new mood after anti-racism in the UK and affirmative action in the US. This industry, what US diversity critic Frederick Lynch (2002) also refers to as the 'social policy machine' includes books, articles, lectures, workshops, video networking and conferences, consulting firms, board games, university courses and of course, training workshops (Prasad and Mills, 1997; Lasch-Quinn, 2002; Jack and Lorbiecki, 2003).

This history of diversity in the US raises questions about how diversity management and diversity training have developed in Europe and in the UK in particular. Across the EU, it has been argued that there are many different approaches to diversity management which have developed historically, culturally, politically and legally from different responses to immigration (Wrench, 2002). A report from 1997 (Bendick et al., 1997 cited in Wrench, 2002) comparing US and European diversity training, showed that over a third of US organisations offered diversity training compared to 9 per cent in the UK and 13 per cent in the Netherlands. In the UK, a decade ago, 60 per cent of UK organisations offered equalities training rather than diversity training and in the Netherlands, over 46 per cent of training was cultural awareness training. More recently, a survey of the top 200 UK companies from the FT 500 showed that one-third of them were actively involved in diversity management.

Diversity training itself comes in an enormous variety of many different forms. There are different pedagogical philosophies, methods and content. For example, Paul Taylor et al. (1997) suggest that there are three main approaches in the UK: providing information, changing attitudes and changing behaviour. Content can include aspects from multiculturalism awareness, racism, legislation, sexism, homophobia, disability awareness, cross-cultural competences, stereotyping, communication skills and attitude awareness (Kossek et al., 2006). A more recent typology from an International Labour Organisation (ILO) seven-year project on the extent, content and impact of anti-discrimination training in the Netherlands, the UK, Finland, Spain and Belgium suggest that there are six types of diversity training within the EU, each with different underlying philosophies, pedagogies and content (Wrench, 2001). The six are information training; cultural awareness training; racism awareness training; equalities training;

anti-racism training; and diversity training (Wrench, 2001). Diversity training focuses on valuing difference and developing a heterogeneous culture. As Wrench summarises it

[B]eing the latest and broadest type, it is likely to include elements of many of the other types: for example, awareness exercises on 'racial sensibility' similar to racism awareness training; sessions on cultural sensitivity as found in cultural awareness training; or strategies of fair recruitment, as found in equalities training. (2001: 4)

There is also a huge variety in the length of training from short two-hour sessions to one-week workshops and now two-year Master's programmes. This survey then underlines the heterogeneity of content and pedagogies in contemporary diversity training in the UK, a point which I shall explore in more detail drawing upon Bakhtin's ideas on dialogism and heteroglossia to which the next section turns.

## DIVERSITY IN LANGUAGE

This section provides an overview of key ideas from Mikhail Bakhtin's work in order to open up thinking about diversity training. A somewhat 'shadowy figure' (Maybin, 2001), whose writings many theorists think also come under the names of Medvedev and Volosinov, Bakhtin's influence on the discipline of literary theory has been quite extensive in the UK and the US since the 1980s. It is growing in educational research on pedagogy but much less evident in organisation studies. Where Bakhtin is used in organisation studies (Rhodes, 2000; De Cock and Chia, 2001), reference is made to diversity because Bakhtin is profoundly interested in diversity in its widest sense, but little use has been made of his work in relation to diversity in the workplace. This is a shame as his ideas provide a good antidote to teleological thinking that can dominate much of the writing on diversity and diversity training (Rhodes, 2000; De Cock and Chia, 2001).

Finally, his work offers a quite different set of conceptual and analytic resources with which to understand power, control and language in the workplace. They provide a contrast to Foucauldian ideas which have become more mainstream. In the words of David Carroll, Bakhtin's 'work opens up the prison house of language' because it sees language as vital, open and based on reciprocity between speaker and listener (1983: 680). For Bakhtin, the meaning of language is neither in abstract relations between signifiers as in Saussurean influenced models nor does it originate in the language user as in more humanist transmission models (Maybin,

2001). Rather, meaning is produced in concrete contexts and dynamic interactive struggles between language users. As a result, words and discourses are seen as ‘dynamic sites of reciprocal exchange rather than fixed semantic positions’ (Pearce, 1997: 67). Influenced by Marxism, the main thrust of his writing is that language is the site of social struggle (Maybin, 2001). This is because first, all utterances in language are intertextual, drawing upon different languages and different voices which make the intentions of language users second-hand; second, all language is ideological or evaluative, passing ‘judgement on the world, even as it describes it’; and third, social interaction is always motivated (*ibid.*: 65). These ideas are developed in a number of Bakhtinian core concepts.

The core concepts that I see as most salient for discussions of diversity training are dialogism, heteroglossia and centripetal/centrifugal forces. These come from a range of writings some identified as Bakhtin and some as Volosinov. The first of these, dialogism – although not actually coined by Bakhtin but by his followers – refers to the way that our use of language is always directed and orientated. Dialogism has the structure of ‘addressivity’ within it: ‘the word in living conversation is directly, blatantly, oriented toward a future answer-word: it provokes an answer, anticipates it and structures itself in the answer’s direction’ (1981: 280). This means that whichever language we are using, we are always in dialogue with other speakers and conflicting languages, from the past, present and future. Thus, language is always in response and in anticipation. For Bakhtin, this is not a one-way process but one in which other speakers and languages address us and our languages in return. This is in contrast with monologic language which was thought to originate from one authoritative source and to be transmitted to the listener.

The second concept, heteroglossia, refers to the multilayered nature of language. Again it is directed against the idea of monologic language which comes from a single, unified source. The multilayered quality of heteroglossia can come from different types and modes of languages such as professional and social languages, rhetorical strategies, jargon, dialects, fads, vocabularies, terminology, styles, generational, racialised and gendered languages and genres. As Bakhtin writes,

[L]anguage is not an abstract system of normative forms but rather a concrete heteroglot conception of the world. All words have the ‘taste’ of a profession, a genre, a tendency, a party, a particular work, a particular person, a generation, an age group, the day and hour. (*Ibid.*: 293)

Language, then, is not neutral but invokes voices, ideologies, social practices and contexts.

Furthermore, intentionality in language is dialogic. Bakhtin writes that 'each word tastes of the context and contexts in which it has lived its socially charged life; all words and forms are populated by intentions' (p. 293). Thus, language 'is populated – overpopulated – with the intentions of others. Expropriating it, forcing it to submit to one's own intentions and accents, is a difficult and complicated process' (p. 294). When we make an utterance, we, in the words of Bakhtin 'appropriate the words of others and populate them with one's own intention' (*ibid.*). This does not mean that our utterances are simply governed by our intentions or our current context. It means that we are like ventriloquists. But we are ventriloquated as much as ventriloquating (Carroll, 1983: 74).

More generally, heteroglossia refers to the value-laden quality of language. Language is not neutral. It shows the way in which language is stratified by different 'socio-ideological languages' from different communities of use such as professions, families, social class, region, friends and so on that are drawn upon in language use (Park-Fuller, 1986). As a result, language is always inherently ideological and evaluative (Maybin, 2001). Heteroglossia is therefore a 'political-semiotic concept' (Doecke et al., 2004: 34). It always represents a worldview. And not all socio-ideological voices are equal – some occupy the centre and some the margins (Baxter et al., 2004). Dialogism and heteroglossia are inflected by power relations.

Third, Bakhtin (1981) points to the conflict in language between two key ideological tendencies: centripetal and centrifugal. These concepts again emphasise the struggle within language between the centre and margins, the standard and diversity (Maybin, 2001). The centripetal force tries to homogenise towards 'political centralization and a unified cultural canon' to suppress destabilising aspects of language by standardising and codifying (*ibid.*: 65). This operates like monologic language which tries to fix meaning. It does this by trying to push language into a single closed and unified authority such as religious dogma, scientific truth, official language, the canon, reinforcing the political and moral status quo (*ibid.*: 65). The opposite force, the centrifugal dynamic, tends to push away from a central point. In this heteroglossic dynamic, language moves in lots of different directions, innovating, destabilising and diversifying and representing more marginalised positions. These dynamic forces are always in tension and can challenge or reproduce social power relations.

In sum, then, dialogism, heteroglossia and centripetal/centrifugal forces provide a 'verbal-ideological texture to language usage (Park-Fuller, 1986: 7). This texture includes the layering of voices, intentions, conflict and different polemics. It shows the imbrication of material verbal practices and ideology in concrete, vital, ongoing ways (Carroll, 1983). Language need

not be simply closed and inert in a monologic, authoritative way but can also be 'actively interpreted, transformed, parodied, exceeded, undermined, subverted' (ibid.: 69). Drawing upon these concepts, we can start to see the struggles between the official and the unofficial views, the dominant and subjugated views (Doecke et al., 2004). They point to the contestation at the centre of utterances – of course, this may be empowering but need not be. This raises important questions for the practice of diversity training to which I turn next.

## VERBAL LABOUR AND VENTRILOQUISM IN THE TRAINING ROOM

So how do Bakhtin's ideas drawn from analysis of the novel help us to start thinking differently about diversity training? What kind of verbal-ideological texture is created in the diversity classroom? Some texts are more obviously heteroglossic than others – for Bakhtin, it is the novel, for Janet Maybin, it is the newspaper report (2001). Drawing on extensive qualitative research on diversity training, I argue that diversity training is also obviously heteroglossic. In this section, I point to some of the ways we can use Bakhtin's ideas as a departure point for analysis of diversity training: my discussion here is necessarily introductory. In this section I show how Bakhtin's concepts can move us away from teleological thinking in the sense that we shouldn't presume to know in advance what diversity training does or the effects it has.

The research involved observational work I undertook from 2003 to 2006 on three different diversity training courses in higher and further education, with one course lasting half a day, the second lasting a full day and the third lasting two days. This was followed up by in-depth interviews with diversity trainers and course participants and documentary analysis of diversity training videos and training exercises and handouts. The sense of anticipation was the most frequently and intensely discussed theme from both the trainers and trainees I interviewed. Andrew Sturdy (2002), in his research on sales trainers, also notes the importance of anticipatory work by trainers but I would argue that the diversity trainers' anticipation was far more emotionally complex. Trainers all referred to the presence of the trainees' actual and potential cynicism, fear, anger, anxiety, hostility and defensiveness, often making trainers feel beleaguered. This sense of anticipation was taken from their previous experiences of training but also projected forward on to their future training encounters. As Bakhtin's notion of dialogism implies, the trainers' utterances were working 'backwards' towards previous utterances, and forwards towards its own addressees'

(2001: 70) and would 'assume and anticipate future turns' (Maybin, 2001: 69). Anticipation, then, worked in multiple temporalities.

The addressee invoked in the training room was also multiple. It involved the actual audience of trainees, of course, as mentioned above, but also the sponsoring organisation, the legislation and the Council for Race Equality, an important arbiter of changing equalities duties. Dialogism also points to the power of the addressee (Pearce, 1997). The trainee audience were active in this addressivity, as they orientated themselves to the utterances in the training room. But they were also responding to 'the already said' that is embedded in the utterance of the trainers, the trainees and previous contexts present in the room. This is not, then, a simple one-way movement of power.

This second link to Bakhtin is the concept of heteroglossia, literally many languages. Through my ethnographic work, I became very aware of the multiple languages with which diversity trainers worked. Thus, the trainers talked in multi-lingual ways about diversity. They did this through their explicit utterances but also in the ways that they used activities to frame diversity in different ways. Some of these pedagogical approaches were pointed to in Wrench's work on diversity training typologies (2001). Thus, the trainers drew on legislative discourses, anti-racism, cultural awareness, and equalities discourses in a variety of ways. But they also mobilised a wider repertoire of soft skills training languages including popular psychology, therapeutic language, new public management, and human resource management. In addition, one example of heteroglossia that gets overlooked in the literature is that the trainers also used languages from black activism, critical race theory and feminist studies. The trainer, then, is heteroglossic rather than monologic, drawing upon diverse and contradictory ideas and languages. These bring in diverse and conflicting contexts, voices and polemics.

The final aspect I want to explore is the idea of the centrifugal force. It is important to stress that all of the sessions I participated in and observed involved much debate. This was opened up by the trainers through the use of discussion, exercises, and multiple and open definitions of core concepts such as diversity. Part of this open approach comes from skills training more widely and its pedagogy of adult learning and group participation. But the other motivation is a recognition by diversity trainers that you cannot close down debate on highly charged issues. Their main strategy in the training I witnessed, then, was centrifugal in that it attempted to destabilise and disperse the impulse to seek authoritative, unified answers. Often, issues and debates were left open.

There were times, however, when there were centripetal moves by the trainers to consolidate and homogenise particular authoritative genres,



languages and postures. This often happened around the use of a particular language. For example, trainees were instructed that certain words such as 'coloured' instead of black were deemed inappropriate for the contemporary diverse workplace. Handouts showed which words were unsuitable, together with their replacements. Trainers also commented on their own strategies for closing down debate and imposing limits. One trainer said to me that he began his training explaining to the trainees: 'I don't want to know what you think about diversity. I just want you to do what we have to do' as a way of disarming the patterns of resistance and hostility he had experienced many times.

It was not just trainers who drew upon centripetal forces: trainees did too. They attempted to close down certain views of the world. The movement between official and unofficial, dominant and subjugated could not be simply mapped on to any one person. As Bahktin's concept of centripetal and centrifugal forces underlines, all utterances are 'contradiction ridden, tension filled unity of two embattled tendencies' (1981: 272).

In this brief overview, I have sought to show how diversity training as a quintessentially heteroglossic space lends itself to a Bahktinian reading. Drawing in particular on his notions of dialogism, heteroglossia and centrifugal/centripetal forces, I show how his work enables us to examine the different ways of speaking in highly concrete ways. His work also emphasises that language use is a struggle over power and meaning, and this is important in relation to diversity in the workplace. In particular, his concepts show that meaning is in relations, and some of the relations are asymmetric. Although hegemonic social relations attempt to fix meanings, there is possibility for disruption. Meaning is not in my intention or speech but produced between myself and another. My speech is always half someone else's. And my utterance is always directed towards another. This is the case for diversity trainers and their trainees. There is no one diversity training encounter.

## CONCLUSION

Teaching and training about equalities, diversity and anti-racism is complex and challenging. Many trainers report burn-out, stress and emotional exhaustion due to the complex dynamics in the training room and dealing with defensiveness and aggression. But my argument in this chapter is that there is still room for hope in diversity interventions, including diversity training. This is not about political naïvety but a request for two things: first, a more in-depth empirical account of diversity training and what it

'does'; second, a recognition that diversity training is marked by diversity and multiplicity and as such represents potential for disruption.

In a rare academic account on being a diversity trainer, April Biccum argues that it is possible to exploit the ambivalence at the heart of current diversity training. Drawing on the work of Homi Bhabba, for Biccum, ambivalence lies in the fact that a liberal democracy is 'forced to legislate for legitimacy's sake against its own institutional racism' (2007: 1). She argues that as a result, diversity training can be read as an 'ambivalent space' in 'the current and paradoxical context of minority rights and immigration crises, international security, terror wars and Millennial development' (p. 3). Exploring her own experiences of running diversity training, she argues that it is possible to exploit this ambivalence through disruption. In particular, she proposes that we can bring national narratives and subjectivities to crisis, albeit temporarily, through offering other sets of knowledges and stories. This disruption, she acknowledges, can also be momentary and have limited success.

In a similar way, using Bahktin's ideas, I have wanted to show that the 'verbal-ideological texture' of diversity training is already disruptive. This makes it hard work for trainers. And not all of the voices, disruptions and languages are supportive of equalities or diversity practices but these can create an openness and vitality around issues to do with racism, disadvantage, conflict and colonial legacies that other workspaces do not. Bahktin's work in relation to diversity training points to first, the importance of researching the ongoing imbrication of concrete verbal practices and ideology; and second, that language need not be simply closed and inert and thus, the diversity training teleology is not complete. This is not to be a Pollyanna of the politically upbeat but to argue that there is room for manoeuvre: language and concepts of society are always in process. While many see diversity training and being politically correct about things being shoved down our throats, Bahktin shows us that we are already ventriloquists and ventriloquated. The words, intentions, contexts and polemics in our mouth are always half someone else's. The question is where do they come from and what do they anticipate, destabilise and disperse?

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## 25. Managing diversity: the virtue of coercion

**Alain Klarsfeld\***

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### INTRODUCTION

There are a variety of rationales for corporations to engage in diversity management practices (Mor-Barak, 2005). Two types of motivation are considered in this chapter. The first finds its roots in the neoclassic paradigm and the work of Gary Becker (1957), which states that fighting against discrimination is ‘rational’, that is, is economically sound for the company, as a more diverse workforce will draw on a larger pool of skills, and will be more creative, thus generating higher levels of performance. The second one is the institutional approach, which views organizational changes as responses to three types of institutional process: coercion, imitation and professional normalization. After a presentation of both rational and institutional frameworks, we provide data about managerial discourse regarding diversity and non-discrimination, followed by an analysis of multilevel institutional processes pressing for the adoption of diversity management and/or anti-discrimination practices in France and, where data are available, their effect. Our objective is thus to answer three questions:

- What is the gap between discourse and practice regarding motivation to adopt non-discrimination practices in France?
- Are voluntary and coercive processes at the various levels opposing or complementing each other?
- Which processes seem to meet with some ‘success’?

### THEORETICAL FRAMEWORK

#### **The Rational View of the Firm**

In this view, firms adopt practices that are best suited to their needs based on economic considerations, for reasons of internal efficiency. This

approach was first formalized by a neoclassical economist in the area of discrimination (Becker, 1957). For this author, there are benefits associated with the use of a diverse workforce, because it allows firms to tap the variety of skills available rather than restricting themselves to a category of workers. Such a view is supported by several types of approach, some universalistic, some contingency based (Delery and Doty, 1996). In the universalistic approach, diversity-orientated practices would be perceived as 'good' whatever the context. In the contingency-based approach, diversity would be an asset in some contexts, but a liability in others.

Much research supports the view that the link between diversity and performance is moderated by a number of intervening variables (Dwyer et al., 2003; Kochan et al., 2003; Lépine et al., 2004; Richard et al., 2004; Kearney and Gebert, 2006; Schöffner et al., 2006). Thus, it can be said that research provides only lukewarm support to the 'business case' for diversity. Yet as we shall see below, rational discourse is often used by human resource and non-HR professionals.

### **The Institutional Approach**

Rather than seeing the adoption of new practices as choices corresponding to an optimum under a set of technical conditions and economic data, Di Maggio and Powell (1983) propose to interpret them as the possible result of three types of change processes that are distinct though possibly overlapping. The first is the search for conformity to constraints of a coercive nature, while the other two are of a more voluntary nature: the second is the diffusion of professional norms or good practices through government or non-government organizations; the third, a process of spontaneous imitation between firms.

#### **A process of coercion**

Activities in organizations are held within a framework that is at least partially binding on them: that of rules or injunctions of all kinds coming from higher 'levels of regulation' (Reynaud, 1997). Legislative devices are typical of this type of constraint. For example, national laws tend to structure the human resource management (HRM) practices and industrial relations, as international comparisons suggest: Germans tend to consult workers more, but they are constrained to do so due to their legal system.

#### **A process of norms building**

Independently from constraints imposed by higher levels of regulation, practices also tend to diffuse themselves under the effect of norms building by organized professions. These trades establish the legitimacy of their

professional autonomy (Di Maggio and Powell, 1983) on a shared cognitive basis. The diffusion of the practices may here originate in development programmes set up by educational institutions, but also in contacts with peers within professional organizations such as the Strategic Human Resource Society in the United States. Members of such professions tend to analyse the situations with which they are confronted in a similar pattern.

### **A process of imitation**

In a context of strong uncertainty, that is, in a context where it is difficult to know in advance the consequences of choices – which is the case in a great number of situations – organizations tend to imitate one another. Faced with new problems, actors within organizations take as reference points practices of companies with high visibility and prestige. These practices function as ‘available solutions’ on which they will draw. Practices of benchmarking that can be observed in many fields of management follow such logic. We support the view that this process is particularly relevant in the HRM field. Empirical data supporting one practice or another are often unavailable when it comes to making a decision in a particular context, under scarce resources. Imitation, that is, modelling on the practices of other companies, in particular of large ‘blue chip’ companies, with strong visibility, allows us to compensate at least partially for this uncertainty and thus to opt for a given practice. Imitation can also take place via consultants, or by applying methods taught in prestigious organizations, such as universities.

### **Processes relevant in the case of changes in the area of discrimination?**

We argue that Di Maggio and Powell’s model is particularly fit to account for progressive change in this area of HRM: non-discrimination is in fact emblematic of the ‘rational–legal’ ideal type of merit-based society prophesized by Max Weber (1922), as opposed to the ‘traditional’ and ‘charismatic’ ideal types. This process of convergence is called ‘isomorphic change’, and its ultimate stage is the actualization of the rational–legal ideal type of society described by Weber, where power is based on rules seen as fair, rather than on tradition or charisma. We shall try to capture how these processes combine in the case of France with regard to action against discrimination.

## **RESEARCH METHOD**

We use secondary data and our own data collection. The latter consists of a first research project conducted between March and June 2005. We

interviewed 53 professionals out of which 34 HR professionals were active within HR departments (or professionals in charge of HR in small firms deprived of a proper HR person or department), 11 recruitment consultants and eight lawyers active in the field of employment discrimination. Most are members of an HRM professional society in France. We also refer to our (still ongoing) second research, involving 32 managers (non-HR), between February and November 2006. All are members of an employers' organization, many of them manager-owners of their business. We asked them about their knowledge and personal perception of the legislation, about existing discriminatory practices, about policies in place to combat discrimination and about their tangible effects. They were also asked to give their opinion *vis-à-vis* two statements regarding the motivation to engage against discrimination, using a Likert scale.<sup>1</sup> The probes are given in detail below. Recruitment consultants were asked about discriminatory demands expressed by their clients, about their response to such demands and their perception about the legislation. Lawyers were asked to describe what types of discrimination cases they had been working on in the past, and what relevant measures companies had to take if they were to prevent legal action. We also conducted secondary research through the use of Internet sources made available by government and non-government organizations about their action in the field of non-discrimination and diversity. This allows us to identify different institutional processes and their possible 'outcomes'. We reviewed eight major voluntary initiatives and eight major binding legal developments and obtained secondary data as to their extent, that is, the percentage of firms or cases complying with or adopting this practice.

## RESULTS

### **Discourse: The Rational View of the Firm in Support of Diversity**

The idea that less discrimination and more diversity is good for performance is very popular among professionals. In the available literature, the European Commission report is a good example of such a belief (European Commission, 2005). Respondents were asked why their firm engaged in diversity policies in the first place. The report states that business motives prevail over compliance with laws when it comes to justify *ex post* why a firm engaged in anti-discrimination policies. In our own research, we explicitly asked a sample of HR managers (members of the then ANDCP, Association Nationale des Directeurs et Cadres de la fonction Personnel, a body representing the HR profession, renamed ANDRH, Association



Nationale des Ressources Humaines, in 2007) within 34 firms in South-West France about their agreement that 'fighting discrimination allows the company to be more efficient', in line with the universalistic-rationalist approach, and balanced their answers against another item measuring the agreement that 'fighting discrimination is a legal constraint', an item in line with the coercive process in the institutional perspective. The mean agreement to the 'rationalist view' statement (impact of fighting discrimination on efficiency) was 3.73, while that of the 'coercive institutional perspective' ('fighting discrimination is a legal constraint') received much less support (mean = 1.79). The difference is statistically significant. The same question put to our second (more recent) sample of managers outside of the HR function led to a similar (3.74 versus 1.90) pair of mean scores for the identical set of statements. Again, the difference is statistically significant.

This support for the rational view is also spontaneously put forward in interviews with professionals as free comments, both within firms and outside among consulting firms, at times almost in Becker's (1957) own terms, that is, stressing the benefits of diversity rather than complying with non-discrimination requirements.

My reaction is to say [to employers refusing to screen minority applicants]: what a waste! We lose 50% of potential applicants. Why cut ourselves off from this? You pay us, it is part of our mission to try and make the pool of potential hires as large as possible. (Recruitment consultant)

I prefer to use the term 'diversity' than the term 'discrimination'. Fighting discrimination is too negative, too much heard about in the media, it assumes firms are guilty of acting illegally. I do not particularly want to 'fight'. What I do not hear enough, is positive talk about the advantages of diversity. Diversity is good business-wise. (General manager of a small and medium-sized enterprise)

Unlike the rational view, the institutional approach is little present in professional discourse. On the contrary, many professionals express doubts, especially about coercive processes, though they admit it is necessary and almost morally compulsory to formally ban discrimination in laws. In line with our findings, as said above, it was found that complying with laws is one of the least-cited motives to engage in diversity/anti-discrimination policies (European Commission, 2005).

In our research, interviewees were also asked what they thought about anti-discrimination law. We find two apparently contradictory results. On the one hand, a majority of professionals who express themselves on the subject are in support of the law, from a moral perspective. The law is, in short, 'an obvious necessity', 'something you cannot do without' as one of

the interviewees puts it. But they discard it when it comes to eliciting actual changes in employers' behaviour. The general feeling is that binding rules are at best useless, at worst, counterproductive; and that 'best-practice' voluntary approaches resting on the power of persuasion and example should be preferred:

This legislation does not prevent discriminatory practices. It assumes that all firms discriminate. Laws are useless against behaviours. Applicants may challenge non-recruitment decision based on discrimination, where it is their competences that are at stake. (HR manager, car rental company)

This legislation is a fool's game. It is an illusion. For instance, selection will always be based on age, even if the résumés exclude any mention of it. Some résumés do not even tell you about the time of presence of the applicant in each of his or her preceding jobs, they are hard to use at all. We see more and more fake résumés. They make everybody waste their time. At the end of the day, selection will happen anyway, it will take place at later stages. (Recruitment consultant)

In order for the employer to protect himself, he will have to find his way around. Such laws make it more expensive for new entrants to enter competition, they favour large groups who can afford the resources necessary to manage this legal complexity. This regulation is absurd. (Recruitment consultant)

Such a view was expressed by 22 HR managers out of 34 HR managers interviewed, and all but one of the 11 recruitment consultants interviewed. Among consultants who were asked what they thought to be the best tools to promote diversity and fight discrimination, only two professionals cite the law as one of the possible resources that can be used to combat discrimination. The same pattern emerges from the 32-manager sample in our ongoing research with non-HR managers: law is cited by three respondents, whereas softer methods resting on 'serving as an example' or 'training/information' are cited by 18 respondents.

In short, according to most professionals interviewed, be they HR or non-HR, if firms do something to fight discrimination, it is for their own good rather than to comply with legal constraints about discrimination. Conversely, another prevailing view is that the law is either useless or cumbersome, and that information and communication are better suited to elicit behavioural changes, than law.

### **Practice: The Predominance of Coercive over Voluntary Processes**

We find that in spite of the rational 'business case' for diversity, a business case that is lukewarm in the face of existing cross-sectional research

though frequently heralded by HR professionals in their discourse, coercive arrangements, more than any other form of voluntary process, have a potential for triggering massive changes in HRM practices at least as far as anti-discrimination is concerned. We find that many voluntary initiatives follow European directives, are government led, and are in fact reinforcing tools for regulations that are being passed at the time or even before the voluntary initiatives were launched: such is the case with the EQUAL partnerships that followed the year 2000's European Directive on Equal Treatment. Such is also the case for the Equality label, and the ORSE (Observatoire de la Responsabilité Sociale de l'Entreprise, French Corporate Social Responsibility Observatory) database, which followed stringent legislation about gender equality, and received the impetus from the relevant state administration. We also find that voluntary organizations such as the ANDRH (the French association of human resource professionals) or the Montaigne Institute (a think-tank endorsing affirmative action) support the adoption of new coercive regulations, beyond traditional 'promoting best practices' types of action. This clearly witnesses the overlapping nature of institutional processes rather than their opposition as far as diversity and discrimination are concerned in France.

Where data are available, we find that the highest figures indicating change in firm behaviour – such as 'voluntarily' adopting binding agreements on gender equality at the company level – follow some form of obligation imposed by the legislator or bargaining partners above enterprise level. Overall, the percentage of firms adopting policies made compulsory by legal provisions, according to the sample, study, and discrimination type, comprises between 4.5 and 28 per cent. This may seem disappointing, but is way above the available figures for the number of firms involved in voluntary processes, comprising between 0.001 and 0.1 per cent of all French firms according to the secondary data to which we have had access.

More qualitatively, we find that new types of litigation are made possible because of the adoption of new regulations: French case law in 1996 opened up opportunities to trade union action some two years later (after a landmark ruling by the French Supreme Court reversed the burden of proof in equality of treatment-related cases). The setting up of the HALDE (Haute Autorité de Lutte contre les Discriminations et pour l'Égalité, French authority entrusted with the duty of ensuring proper enforcement of the equal opportunity legislation) in 2005 triggered a high number of complaints of a new kind (ethnic rather than union based) almost overnight. Our data underscore the potential of coercive legislation to trigger actual changes in organizational practice in spite of managerial

belief that such legislation may be useless and that firms change by their own goodwill.

Another important point of our research, is that we find that diversity policies and anti-discrimination legislation tend to appear simultaneously and complement one another, rather than opposing or succeeding one another, let alone replacing one another. This seems to be a major difference with Anglo-Saxon countries, where it has been advocated that diversity management may 'replace' equal opportunity and affirmative action. From the French perspective, one could almost say that diversity and non-discrimination reinforce each other and are often hard to separate as both terms are often used simultaneously within the same institutional process, be it voluntary or binding. Voluntary action revolving around the word 'diversity' is not intended to replace legal processes but rather tends to build on them as has been said above. Such is the case with the EU's EQUAL initiative, or the French government's 'Equality' label, which are supporting voluntary tools for existing legislation. The CJD (Centre des Jeunes Dirigeants, an association for young business people), which is a militant advocate of 'diversity' management, also takes an active part in diffusing the French legal anti-discrimination rules among its members, with the argument that this gives one more argument (beyond Becker's economic rationality argument) to employers, to seek diversity and combat discrimination. The reinforcing relationship may also function the other way around: the Montaigne Institute and the ANDCP, both clearly seek to influence the public debate and both press for the adoption of more coercive legislation in the area of diversity. Our data also reveal some degree of overlap in the vocabulary relating to both diversity and discrimination: voluntary initiatives such as 'EQUAL' at the European level, the 'Equality' label and the 'Diversity Charter' in France include typical coercive, legal-like, vocabulary (to start with the word 'equality' in the case of the first two, and 'discrimination', in the case of the Diversity Charter), although they are of a voluntary nature. Conversely, the binding intersectoral agreement reached in November 2006 between employers' organizations and trade unions refers in its title to 'diversity' although it is, strictly speaking, a coercive – albeit soft – text, whose explicit aim is to combat discrimination: '*lutte contre les discriminations*' (literally, fighting discrimination) are its first four words. As a matter of fact, we find, in France, that the terms 'diversity' and 'discrimination' are used in combination, not in opposition to each other. We find that whichever term is used, the concern is to develop more diverse and inclusive workplaces, and to fight discrimination, through voluntary or binding processes.

## CONCLUSION

In this chapter, we have attempted to confront economic rationality and the institutional approach in order to explain why firms engage in diversity and non-discrimination policies in France. We bring empirical evidence that demonstrates the influence of the legal agenda and to a lesser extent, other institutional isomorphic change processes on the adoption of non-discrimination policies. We also find a particular intertwining of voluntary and coercive processes. Although they are scarce, available data from our own research and other sources suggest the importance of coercive institutional processes. Voluntary processes may be followed but nowhere do these processes achieve, in terms of scale, what can be achieved through legal processes. Voluntary and coercive processes, however, complement and do not oppose each other. Similarly, parallel, diversity management and anti-discrimination practices are often hard to distinguish, as both terms are frequently used within the same processes, be they voluntary or coercive. Therefore it can be affirmed that the assertion 'diversity management replaces equal employment opportunity', or affirmative action or other sorts of anti-discrimination policies, does not hold in the case of France.

## NOTES

\* The author is grateful for the support provided by the European Commission's EQUAL programme, the ANDCP (Association Nationale des Directeurs et Cadres de la fonction Personnel) now called ANDRH, and the CJD (Centre des Jeunes Dirigeants).

1. Responses were Likert scales ranging from 1 to 5, 1 = does not agree at all; 5 = fully agrees.

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## 26. Supporting the career development of managerial women: recent evidence\*

**Ronald J. Burke<sup>1</sup>**

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### INTRODUCTION

Several factors have come together in making organizations more interested in supporting the career aspirations of professional and managerial women (Burke and Nelson, 2002). These include increases in the numbers of women who have the education, experience and track record for advancement, the shortage of qualified leaders and the lack of leadership bench strength reported by most organizations, increased competitive pressures that have put the spotlight on tangible job performance, the loss of qualified women as a result of 'opting out' (Hewlett and Luce, 2005), and the need to recruit and retain 'the best and the brightest' if one is to win the way for talent (Michaels et al., 2001).

A small but increasing number of organizations in the UK and North America have implemented practices to support and develop managerial and professional women (Morrison, 1992; Davidson and Burke, 2000; McCracken, 2002). These organizations have reported positive outcomes such as an increasing number of women now participating in key training and development activities, and an increase in the number of women on the short list for promotions and achieving a more senior position.

Several authors have chronicled the efforts of leading-edge organizations in supporting women's advancement (Jafri and Isbister, 2002; Mattis, 2002; Spinks and Tombari, 2002; Mays et al., 2005; Rutherford, 2005). These writers describe specific initiatives (for example, flexible work hours, gender awareness training) and in some cases present evidence of the success of these efforts in supporting women's career advancement.

We still know relatively little about how managerial and professional women experience these initiatives, however. This chapter attempts to fill in this gap in understanding. It considers the relationship, in three separate studies of a number of organizational practices designed to support

and develop managerial and professional women and their level of job and career satisfaction and psychological health. The general hypothesis underlying this research was that women describing a greater number of practices supportive of women by their organization would also indicate more favorable work, career and health outcomes. That is, the simple perception that such practices exist will have a positive relationship with women's satisfaction and well-being.

Some light has been shed on the types of work experience likely to be associated with women's career development. Morrison et al. (1987), in a three-year study of top female executives, identified six factors which contributed to the women's career success. These were: help from above, a track record of achievements, a desire to succeed, an ability to manage subordinates, a willingness to take career risks, and an ability to be tough, decisive and demanding. Three derailment factors were common in explaining the failure of some female managers to achieve expected levels. These were: inability to adapt, wanting too much (for oneself or other women) and performance problems.

Furthermore, to be successful, women, more than men, needed help from above, needed to be easy to be with, and to be able to adapt. These factors related to developing good relationships with men in a male-dominated environment (also see Ragins et al., 1998). Women, more than men, were also required to take career risks, be tough, have a strong desire to succeed and have an impressive presence. These factors could be argued to be necessary to overcome the traditional stereotype of women, such as being risk averse, weak and afraid of success. Unfortunately, the narrow band of acceptable behavior for women contained some contradictions. The most obvious being take risks but be consistently successful, be tough but easy to get along with, be ambitious but do not expect equal treatment, and take responsibility but be open to the advice of others, that is, more-senior men. These findings suggest that additional criteria for success were applied to women so that women had to have more assets and fewer liabilities than men.

As part of the same study, Morrison et al. (1987) also examined the experiences of women who had advanced to levels of general management. They identified four critical work experiences: being accepted by their organization, receiving support and encouragement, being given training and developmental opportunities, and being offered challenging work and visible assignments. In speculating about their future success, these career-successful women perceived that there were even more constraints and less support now than in lower-level positions. Many reported exhaustion and talked about their future involving doing something very different from what they were currently doing. In a series of follow-up interviews,



Morrison et al. (1992) obtained information from approximately one-third of their original sample and found that although some women had made progress, many were still stuck.

The literature on work experiences and career development can be organized within a framework proposed by Morrison (1992). Her model for successful career development includes three elements which interact over time to spur and sustain development. These elements are challenge, recognition and support. This model is based on research with women in managerial practice and is consistent with her earlier work with McCall and Lombardo (McCall et al., 1988), which identified three work experiences with developmental value – specific jobs, other people and hardships. These can be recast as challenge, and presence or absence of recognition and support. McCall et al. (1988) studied the kinds of experience that develop managers and what makes them developmental. They found that five broad categories of experience had developmental potential (challenging jobs; other people, particularly bosses; hardships; coursework; off-the-job experiences) but that it was also important for the individual to have learned lessons from them. Learning was made possible, but not guaranteed, by these experiences.

Morrison defines the components of her model as follows. The *Challenge* of new situations and difficult goals prompts managers to learn the lessons and skills that will help them perform well at higher levels. *Recognition* includes acknowledgment and rewards for achievement and the resources to continue achieving in the form of promotions, salary increases and awards. *Support* involves acceptance and understanding along with values that help managers incorporate their career into rich and rewarding lives. This model assumes that all three elements must be present in the same relative proportions over time – balanced – to permit and sustain development.

Morrison proposes that, for women, an imbalance typically occurs such that the level of challenge exceeds the other two components. Her research shows that aspects of assignments and day-to-day life which constitute challenge are often overlooked, recognition may be slow, and traditional support systems may fall short. Common barriers to advancement (stereotypes, prejudices, male discomfort) contribute to this imbalance, and as a consequence managerial women become exhausted, experience failure and may ‘bail out’ of this frustrating work situation (White et al., 1992).

An important method for preparing individuals for executive jobs is to plan a sequence of assignments that provide continued challenge, for example, for changing or rotating jobs every year or two. New assignments require the learning of new or better skills, broaden one’s perspective, stretch the individual to develop and also serve as ‘tests’, by which individuals are rewarded, and/or promoted (Mainero, 1994).

An interesting question becomes whether or not managerial and professional women experience the same developmental job demands and learn similar skills from them. One possible explanation for the 'glass ceiling' is that women are afforded different developmental opportunities from men over the course of their career. McCall et al. (1988) and Horgan (1989) suggest that certain types of job assignments and challenging experiences are less available to women. For example, women may be offered staff, not line jobs, and jobs that are not high profile or challenging.

Some of these suggestions were supported by Ohlott et al. (1994) when they looked at the demands of managerial jobs and factors which may complicate learning from the job. They found that women experienced very different demands from managerial jobs and they had to work harder to prove themselves, but women were also learning about managerial work from a greater variety of sources than were men. Horgan (1989) also suggests that what is learned from a given set of developmental experiences may differ between men and women.

Although some sources of challenge are common to all managers (high stakes, adverse business conditions, dealing with staff members) women may experience additional challenges such as prejudice, isolation or conflict between career and personal life, and may also face higher performance standards, more adverse conditions (resentment and hostility of male staff), more scrutiny and more 'second-shift' work (Hochschild, 1989). Despite these things, limiting challenge is dangerous for the career advancement of women, since giving women less important jobs and not considering them for key assignments blocks their advancement by denying them important business experiences. Morrison (1992) advocates not reducing the level of job challenge but reducing demands from other sources – by reducing prejudice, promoting other women, using the same performance standards – and providing commensurate recognition and support so that the critical balance of these three items is retained.

Education, training and development can be conceived of as being either or both challenge and support. To the extent that they may provide technical training, coaching and key assignments, they represent challenge and a chance to improve/prove oneself. To the extent that they may involve training geared to women, for example, assisting women with issues unique to being women in male-dominated organizations or industries, or providing career pathing or mentoring, they could be viewed as support activities. Some activities, for example, mentoring, clearly involve aspects of challenge and support.

Recognition involves acknowledging and adjusting to the additional challenges faced by women in organizations because they are women.

Equal performance by men and women in a male-dominated organization may mean that women have overcome more and this must be recognized. Furthermore, when contemplating a challenge such as a new task or promotion, women may seem less keen because they are aware of the additional challenge of being a woman performing that new task. The reward system must account for this. Morrison concludes that expected rewards fall short for women when one considers additional demands and sacrifices needed. Women are more likely to have the title 'acting' and to do the job before getting it than are male colleagues, and receive fewer promotions and benefits and less pay than men (Morrison and Von Glinow, 1990). The forms that recognition takes include pay, promotion, prerequisites, inclusion in decision, respect and credibility and faith (Morrison, 1992). Statistics which indicate the continuing presence of a glass ceiling are evidence that recognition in the form of promotion has not been forthcoming for women.

Support is necessary to help women cope with the additional demands, and the absence of acceptance and collegiality contributes to the isolation and discouragement that women feel (Morrison et al., 1987). Sources of support include features of the work environment such as mentors, sponsors, information feedback and networks as well as organizational and societal support for dual-career couples. Women may face additional unique challenges because of the scarcity of female role models, difficulty in getting feedback and a lack of acceptance and support (ibid.).

## CANADIAN WOMEN BUSINESS SCHOOL GRADUATES

Data were collected from 792 women graduates of the same Canadian business school, a 55 percent response rate. The sample tended to be in early career (1–10 years work experience), fairly young (average age about 30), married (about 66 percent), and childless (66 percent). Three versions of the questionnaires were developed, each having about 270 respondents.

Three work and career experiences were included: support and encouragement, training and development; and feeling accepted. In addition, use of career strategies and levels of supervisor support were considered as well. Dependent variables included work outcomes (job satisfaction, career satisfaction, future career prospects, intent to quit) and psychological well-being (psychosomatic symptoms).

The following results were observed. First, women participating in more training and development activities, and women rating these activities

Table 26.1 Demographic characteristics of sample

Characteristic	N	%	Characteristic	N	%
<i>Age</i>			<i>Type of degree</i>		
25 or less	41	41.8	Undergraduate	78	79.6
26–30	35	35.8	Graduate	20	20.4
31–35	7	7.1	<i>Employment status</i>		
36 or older	15	15.3	Full-time	85	86.7
<i>Marital status</i>			Part-time	9	9.2
Single	59	60.2	On leave	4	4.1
Married	39	39.8	<i>Parental status</i>		
<i>Length of marriage</i>			Children	21	22.3
1 year	5	11.6	Childless	73	77.7
2–5	20	46.5	<i>Number of children</i>		
6–10	7	16.3	0	74	78.7
11 or more	11	25.6	1	5	5.3
<i>Year of business degree</i>			2	3	3.2
1995 or earlier	4	4.2	3	9	9.6
1996–2000	39	40.6	4 or more	3	3.2
2001–2004	53	55.2	<i>Worked continuously</i>		
<i>Organizational level</i>			Yes	67	69.1
Non management	35	36.5	No	30	30.9
Lower management	27	28.1	<i>Worked part-time</i>		
Middle management	24	25.0	Yes	58	61.6
Senior management	10	16.4	No	37	38.4
<i>Hours worked</i>			<i>Job tenure</i>		
30 or less	8	8.2	1 year or less	47	48.4
31–40	36	37.2	2–5	44	44.9
41–50	45	46.4	6 or more	7	7.1
51 or more	8	8.2	<i>Role</i>		
<i>Organizational tenure</i>			Core	39	41.1
1 year or less	31	32.3	Support	56	58.9
2–5	43	44.8			
6 or more	22	22.9			
<i>Organizational size</i>					
50 or less	24	26.7			
51–200	25	27.7			
201–1000	21	23.4			
1001 or more	20	22.2			

more useful were more job and career satisfied and less likely to quit. Second, women reporting more positive work and career experiences also reported higher levels of job and career satisfaction, future career prospects and less intention to quit. Third, women making greater use of career

Table 26.2 Correlates of supportive organizational practices

Personal and work situation characteristics	Organizational practices
Age	-0.01
Work status	0.05
Job tenure	-0.04
Organization tenure	0.00
Education	0.14
Organizational size	0.24*
<i>Work outcomes</i>	
Job satisfaction	0.25**
Career satisfaction	0.28***
Intent to quit	-0.18 <sup>a</sup>
Hours worked	-0.20*
<i>Psychological health</i>	
Psychosomatic symptoms	-0.22*
Exhaustion	0.04
Physical well-being	0.08
Emotional well-being	0.04
<i>Extra-work satisfactions</i>	
Family	0.02
Friends	0.12
Community	0.21*

Note: \*\*\*  $p < 0.001$ ; \*\*  $p < 0.01$ ; \*  $p < 0.05$ ; <sup>a</sup>  $p < 0.10$ .

strategies indicated higher levels of job and career satisfaction. In addition, women reporting higher levels of supervisor support also indicated greater job and career satisfaction.

## WOMEN IN BANKING IN TURKEY

Data were collected from 286 females in managerial and professional jobs in a large Turkish bank, a 72 percent response rate. The majority were 40 years of age or younger (69 percent), married (79 percent), had children (76 percent), had one or two children (87 percent), held bachelor's university degrees (79 percent), were in lower or middle management jobs (82 percent), had worked continuously since graduation (68 percent), had only worked full-time (77 percent), worked for the bank 10 years or more (53 percent), had 10 years or less of job tenure (75 percent) and worked between 41 and 50 hours per week (56 percent).

Five supportive work and career experiences were included: negative attitudes towards women; equal treatment; support; career barriers; and use of male standards. Work attitudes included measures of engagement, job and career satisfaction and intent to quit. Measures of psychological well-being included psychosomatic symptoms, emotional exhaustion, physical well-being and emotional well-being.

Hierarchical regression analyses were undertaken, controlling both personal and work satisfaction characteristics, before considering the relationship of the work and career experience on the various dependent variables. Supportive work and career experiences had significant relationships with all three engagement measures. Negative attitudes towards women had significant negative relationships with all three; equal treatment and support had positive relationships with two of the three. Work and career experiences had significant relationships with two of the three work outcomes (job and career satisfaction); women indicating fewer negative attitudes toward women, and women indicating higher levels of support, indicated higher levels of both job and career satisfaction. Finally, work and career experiences had a significant relationship with all measures of psychological well-being; women indicating more negative attitudes towards women and women indicating less support reported higher levels of distress on each measure.

Table 26.3 *Organizational practices and work outcomes*

Work outcomes	<i>R</i>	<i>R</i> <sup>2</sup>	$\Delta R^2$	<i>P</i>
Job satisfaction ( <i>N</i> =80)				
Personal demographics	0.39	0.15	0.15	0.05
Work situation	0.48	0.23	0.08	NS
Organizational practices (0.21)	0.52	0.27	0.04	0.10
Career satisfaction ( <i>N</i> =86)				
Personal demographics	0.22	0.05	0.05	NS
Work situation	0.37	0.14	0.09	NS
Organizational practices (0.22)	0.42	0.18	0.04	0.10
Intent to quit ( <i>N</i> =80)				
Personal demographics	0.21	0.04	0.04	NS
Work situation	0.25	0.06	0.02	NS
Organizational practices	0.30	0.09	0.03	NS
Hours worked ( <i>N</i> =80)				
Personal demographics	0.32	0.10	0.10	NS
Work situation	0.42	0.18	0.08	NS
Organizational practices (-0.25)	0.48	0.23	0.05	0.05

## EARLY CAREER WOMEN MANAGERS IN AUSTRALIA

Data were collected from 98 women graduates of the same business school in early career, a 10 percent response rate. Most were 30 years of age or younger (77 percent), had undergraduate degrees (80 percent), were single or divorced (60 percent), childless (78), worked full-time (87 percent), had graduated within the past five years (55 percent), were in non-management or lower management jobs (65 percent), had worked continuously since graduation (69 percent), had short organizational and job tenure (77 and 93 percent having five or fewer years) and worked between 41 and 50 hours per week (46 percent).

Five areas of supportive practice were considered: management support; policies and resources; administration; training and development; and recruiting and external rotations. Dependent variables included work outcomes (job and career satisfaction, intent to quit), psychological well-being (psychosomatic symptoms, emotional exhaustion, physical and emotional well-being) and three areas of extra-work satisfaction (family, friends, community).

Again, hierarchical regression analyses were undertaken controlling for both personal and work situation characteristics before examining the

*Table 26.4 Organizational practices and psychological well-being*

Psychological well-being	<i>R</i>	<i>R</i> <sup>2</sup>	$\Delta R^2$	<i>P</i>
Psychosomatic symptoms ( <i>N</i> =80)				
Personal demographics	0.29	0.08	0.08	NS
Work situation	0.34	0.12	0.04	NS
Organizational practices (-0.31)	0.44	0.19	0.07	0.05
Exhaustion ( <i>N</i> =80)				
Personal demographics	0.34	0.12	0.12	NS
Work situation	0.35	0.12	0.00	NS
Organizational practices (-0.26)	0.42	0.18	0.06	0.05
Physical well-being ( <i>N</i> =80)				
Personal demographics	0.34	0.11	0.11	NS
Work situation	0.38	0.14	0.03	NS
Organizational practices	0.38	0.14	0.00	NS
Emotional well-being ( <i>N</i> =81)				
Personal demographics				
Work status (-0.32)	0.38	0.15	0.15	0.05
Work situation	0.42	0.18	0.03	NS
Organizational practices	0.42	0.18	0.00	NS

Table 26.5 Organizational practices and extra-work satisfactions

Extra-work satisfactions	<i>R</i>	<i>R</i> <sup>2</sup>	$\Delta R^2$	<i>P</i>
Family ( <i>N</i> =80)				
Personal demographics	0.48	0.23	0.23	0.001
Work status (-0.29)				
Marital status (0.28)				
Work situation	0.58	0.34	0.11	0.05
Role (0.30)				
Organizational practices	0.58	0.34	0.00	NS
Friends ( <i>N</i> =80)				
Personal demographics	0.30	0.09	0.09	NS
Work situation	0.35	0.12	0.03	NS
Organizational practices	0.36	0.13	0.01	NS
Community ( <i>N</i> =80)				
Personal demographics	0.47	0.22	0.22	0.01
Age (0.46)				
Work status (-0.25)				
Work situation	0.54	0.30	0.08	NS
Organizational practices	0.56	0.31	0.01	NS

relationship of the work and career experiences with the various dependent variables. The five organizational practices were combined into a total score.

Organizational practices had significant relationships with both job and career satisfaction (but not intent to quit). In addition, organizational practices had a significant relationship with both psychosomatic symptoms and exhaustion (but not with physical or emotional well-being). Women indicating more supportive practices also reported fewer psychosomatic symptoms and less emotional exhaustion. Finally, supportive practices were found to have no relationship with measures of extra-work satisfaction.

In a separate analysis, women indicating more mentor functions also indicated greater job and career satisfaction, more-optimistic future career prospects and fewer psychosomatic symptoms.

## IMPLICATIONS

Turning now to the benefits of undertaking these supportive organizational practices, the data show wide-ranging positive outcomes. That is, women describing more supportive organizational practices also indicated more job and career satisfaction and higher levels of psychological well-being.



Others (Hammond, 2002; Giscombe, 2005; Mattis, 2005) have reported favorable job and career consequences of supporting women's career advancement but few have studied psychological well-being. Extending the benefits of organizational practices supporting women to a consideration of their psychological health seems to be a logical extension given the association of job and career experiences with psychological well-being more generally (Burke and Nelson, 2002; Burke, 2003).

Finally, these findings have a direct bearing on practice. We have come to considerable understanding of the qualities that are part of work environments that are supportive of the career aspirations of women (and men). These include: top management support and commitment to the exercise, the explicit use of gender in decision making in recruitment, career planning and employee development, the development of policies and procedures consistent with the goal of supporting women, the provision of rewards for providing the required support and achieving agreed-upon goals for women's advancement, and becoming a model (in the wider community) of what can be accomplished through commitment, resources and effort.

In addition to these context efforts, other initiatives follow logically from them. These include providing support and encouragement to women offering women challenging and visible work assignments, providing training and development opportunities and supporting cultural values accepting of women (Morrison, 1992). In addition, considerable progress has been made in integrating work-family concerns (Burke and Nelson, 2002).

## NOTES

\* Preparation of this chapter was supported in part by the Schulich School of Business, York University, Carol McKeen, Mustafa Koyuncu and Zena Burgess contributed to data collection in these projects. Lisa Fiksenbaum assisted with data analysis; Louise Coutu prepared the manuscript.

1. Readers interested in more detail of each of the three studies should contact the author.

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## 27. Internal compensation discrimination: empirical and theoretical developments

**Daniel E. Martin**

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### INTRODUCTION

A majority of Western nations maintain anti-discrimination laws which ostensibly prevent discrimination in employment processes. However, prescriptive versus descriptive outcomes suggests that discrimination remains a significant barrier to equality in the employment process (Sidanius and Pratto, 2001). While research has established the existence of discrimination across the human resources process, little attention has been paid to job evaluation which leads to the structuring of pay and the relative value of positions across organizations.

Discrimination theories have generally tried to explain race and sex inequality in organizations based on out-group hostility or perceived competition. Economists have theorized markets drive selection of the most productive employee without consideration of demographics to maximize profits (Becker, 1959; England, 1992); social psychologists have suggested in-group preference (Brewer and Brown, 1998; Fiske, 1998) or hierarchy maintenance (Sidanius and Pratto, 1999). Interdisciplinary theories have suggested an additive perspective in the multiple jeopardy–multiple advantage hypothesis (Ransford, 1980); suggesting that membership in multiple low social categories will be offered fewer economic benefits.

### THE EQUAL PAY ACT, TITLE VII OF THE CIVIL RIGHTS ACT OF 1964 AND POINT FACTOR JOB EVALUATION SYSTEMS

The United States recognized and provided for the protection of women and minorities against pay discrimination by enacting the Equal Pay Act (EPA) of 1963 and Title VII of the 1964 Civil Rights Act. After 30 years

of anti-discrimination legislation, the gender discrepancy between salaries is well established (US EEOC, 2000) but the impact of job evaluation on potentially discriminatory outcomes among women and minorities has not been established.

Job evaluation establishes value within jobs and how value is determined for similar/equal jobs. Point-factor job evaluations make the criteria for evaluating jobs explicit through the establishment of compensable factors. Compensable factors are organizationally valued work characteristics, based on job analysis (Milkovich and Newman, 2005; Henderson, 2006). While the EPA uses compensable factors to evaluate job similarity, it does not address the potential differences in the way compensable factors are internally weighed. Based on the above, and because point-factor plans are the most commonly used job evaluation method in the US and Europe (Milkovich and Newman, 2005), we examined point-factor job evaluation systems for potential discrimination.

Job evaluation is usually conducted by managers or a job evaluation committee (Martocchio, 2004), but evaluators may bring individual references to the evaluation of the compensable factor, as opposed to considering the factor alone (Blumrosen, 1979; Arvey et al., 1985; Arnault et al., 2001). Under Title VII, differential weighting of compensable factors based on perceptions of incumbents, applicants, or the potential labor pool can be construed as disparate impact.

It has been argued that compensable factors and weights are subjective, and evaluators unreliable due to individual differences and bias (Arvey et al., 1985). One study had three commercial job evaluation firms independently rate 27 jobs using separate evaluation methods with results not rating the same factors, suggesting that the factors and weighting will depend on the evaluator. Importantly, evaluators should be evaluating jobs, not people; however, evidence suggests consideration of incumbents, applicants and labor pools, not the job (Arnault et al. 2001). Studies have also found that evaluators receiving similar information emphasize different factors based on evaluator gender (Arvey et al., 1985), while others have shown (Grinder and Toombs, 1993) that average job-evaluation scores were not significantly different by gender, leading to a lack of clarity in the research.

## INDIVIDUAL DIFFERENCES

Other factors may impact on the weighting of compensable factors. Ethnocentrism is the tendency to believe or feel that one's ethnic background is superior to out-groups (Weber, 1994). Accordingly, individuals may identify with their cultural background, using out-group standards

for non-members, manifesting ethnocentric judgments during the weighting of the compensable factors.

As acculturation plays a role in identity, its relevance to the evaluation of compensable factors was considered. Berry et al. (1989) proposed a four-strategy model to describe the acculturation strategy of an individual relationship with the dominant culture:

- *assimilation*, adherence to the other culture's values;
- *separation*, adherence to own cultural values, and rejection of the other culture's norms;
- *integration*, acceptance of both sets of cultural norms; and
- *marginalization*, rejection of both sets of culture.

We used the Berry et al. acculturation dimensions to establish potential impact in the individual weighting of compensable factors.

Cognitive biases may play a role in the weighting of compensable factors (Dasgupta and Greenwald, 2001). Need for cognition (NFC) describes individual differences, the likelihood of effortful cognitive activities, and has been negatively correlated with modern racism in college students (Waller, 1993).

Our study presupposed several steps in the point-factor methodology being completed by the time participants have received their instructions. Specifically, the job analysis of a benchmarked position (office manager) being executed; and compensable factors identified and scaled, enabling subject matter experts (in study one students) to weight the compensable factors (Milkovich and Newman, 2005; Henderson, 2006).

## STUDY ONE

This study explored (i) the impact of the perceived ethnicity/gender, (ii) the strength of cultural identification on weighting compensable factors, and (iii) external compensation and the impact of the aforementioned independent variables in a student population.

### **Hypotheses**

*H1: Significant differences in weighting of compensable factors and salary based on perceived ethnicity and gender of the labor pool.*

*H2: Significant differences in the weighting of compensable factors and salary based on participant demographics.*

*H2a: Participant ethnicity.*

*H2b: Participant gender.*

*H3: Significant differences in the weighting of compensable factors and salary based on individual differences.*

## Method

### Sample

The sample came from a medium-sized public university on the west coast. Graduate and undergraduate business students participated, ages ranged from 20 to 56, 75 percent being between the range of 20 and 30 years old; 55 percent were female, 45 percent were male; 59 percent of the participants self-identified as being Asian with 15 percent self-identifying as Caucasian. Given the sample, we analyzed Asian, Caucasian and Others as groups.

### Procedure

Following an introduction, the first section exposed individuals to a stimulus office manager job description that manipulated the labor pool (a majority, 70 percent, being of one gender), and ethnicity (African-American or Caucasian) of the position being evaluated (office manager). As such, four forms were randomly passed out during 2005.

Second, students were asked to assign a percentage to compensable factors (knowledge/education/experience, responsibility, effort, and working conditions) indicating their relative organizational importance, with the total percentage adding up to 100 percent. As the students had little exposure to compensation concepts, examples were given.

Third, students considered a range of salary for the position based on external salary surveys. They were asked to indicate what salary human resources should offer potential office manager candidates. Fourth, students responded to an NFC scale (Cacioppo et al., 1984). Fifth, students

*Table 27.1 Study one: participation by version*

Participant version	Frequency	Valid percent
African-American female	92	24.1
African-American male	98	25.7
Caucasian female	98	25.7
Caucasian male	93	24.4
Total	381	100.0

responded to two acculturation questions. Finally, students were asked a series of demographic questions, specifically their ethnicity, age, sex, and educational status.

### **Analyses**

Multivariate analysis of covariance (MANCOVA) was used to test the hypotheses, with compensable factors (knowledge, responsibility, effort, and working conditions) and salary serving as dependent variables. Participant gender, questionnaire version, participant ethnicity and level of acculturation served as fixed factors (Tabachnick and Fidell, 1996). Need for cognition was used as a covariate.

Using Wilks' criterion, we found modest (acculturation partial  $\eta^2 = 0.09$ ) to small associations (version partial  $\eta^2 = 0.05$ ) between the combined dependent variables and the main effects. Associations between the combined dependent variables and the interactions were modest. Table 27.2 provides a summary of the significant multivariate Wilks' Lambda test.

To identify significant main effects and interactions found in the MANCOVA, the results of the MANCOVA between-subjects effects tests were analyzed further (see Table 27.3).

For the purposes of comparison, two new variables representing either an African American or White labor pool (New Race), or a Female or Male (New Sex) labor pool were constructed. A subsequent MANCOVA was run with the inclusion of the two new variables, and the removal of the version (manipulated labor pool composition) variable. Significant MANCOVA multivariate test (Wilks' statistic) are presented in Table 27.4.

To further identify significant main effects and interactions found in the MANCOVA, we interpreted the results of the MANCOVA between-subjects effects tests (see Table 27.5).

*Table 27.2 Study one: significant MANCOVA multivariate test (Wilks' statistic)*

Effect	$\Lambda$	<i>F</i>	df	Error df	<i>p</i>	Partial $\eta^2$
Version	0.851	2.15	15	538.71	0.007	0.052
Acculturation	0.908	3.96	5	195.00	0.002	0.092
Sex * Ethnicity	0.879	2.60	10	390.00	0.004	0.063
Version * Acculturation	0.881	1.68	15	538.71	0.050	0.041
Sex * Ethnicity * Acculturation	0.905	1.99	10	390.00	0.033	0.049
Sex * Version * Ethnicity	0.940	2.50	5	195.00	0.032	0.060
* Acculturation						

Table 27.3 Study one: significant MANCOVA between-subjects effects tests

Source	D.V.	Type / III SS	df	F	p	Partial $\eta^2$
Version	Resp.	605.4	3	2.84	0.039	0.041
	Salary	18.99	3	2.90	0.036	0.042
Acculturation	Effort	452.12	1	6.46	0.012	0.031
Sex * Ethnicity	Know.	1343.8	2	4.52	0.012	0.044
	Effort	870.97	2	6.22	0.002	0.059
Sex * Version * Ethnicity	Effort	938.56	6	2.23	0.041	0.063
Sex * Acculturation	Salary	12.80	1	5.87	0.016	0.029
Sex * Ethnicity * Acculturation	Effort	553.07	2	3.95	0.021	0.038
	Salary	20.62	1	9.46	0.002	0.045

Table 27.4 Study one: significant MANCOVA multivariate test (Wilks' statistic)

Effect	$\Lambda$	F	df	Error df	p	Partial $\eta^2$
Sex (New Labor Pool)	0.944	2.32	5	195.00	0.045	0.056
Acculturation * Sex (New Labor Pool)	0.940	2.47	5	195.00	0.034	0.060

Table 27.5 Study one: significant MANCOVA between-subjects effects tests

Source	D.V.	Type / III SS	df	F	p	Partial $\eta^2$
Sex (New Labor Pool)	Resp.	325.94	1	4.59	0.033	0.023
	Salary	10.29	1	4.72	0.031	0.023
Acculturation * Sex (New Labor Pool)	Salary	9.99	1	4.58	0.033	0.023



## **Results**

H1: Significant differences were found for perceived ethnicity and gender in the weighting of the responsibility compensable factor (see Tables 27.2 and 27.3). Specifically, when considering the project management position, participants weighed responsibility as more important (31.61) for White females than in the other ethnicity/gender mixes.

H2: In the assessment of the importance of knowledge as a compensable factor in the project management position, Asian participants' perspectives were extremely stable (36.65 for Asian males, and 36.68 for Asian females) when compared to Caucasian participants. Caucasian males weighting the relative importance of knowledge at 29.72, whereas Caucasian females weighted the importance as 42.91.

H3: The interaction between male and female participants and their relative acculturation status presents an important finding. Our sample represented only two of the four potential acculturation classifications (integrated and marginalized). Male participants classified as marginalized offered significantly less salary (3.81) compared to their counterparts in the integrated classification (4.67). Females classified as marginalized offered significantly more (4.95) than their integrated counterparts (4.35).

The impact of acculturation also makes an important contribution in understanding the perceived value of compensable factors. Those who are classified as marginalized participants in our study perceived effort as being significantly more important (27.17) than their compatriots who were classified as being integrated (21.53).

## **STUDY TWO**

As student-based findings do not represent actual professionals in the field and our manipulated variables did not reflect what would normally be found in a job description (proportion of ethnicity/gender), we next sampled actual compensation professionals and managers.

### **Hypotheses**

*H1: Based on previous findings, we anticipated significant differences in relative weighting of compensable factors and salary based on perceived:*

*H1a: ethnicity of labor pool; and*

*H1b: gender of labor pool.*

*H2: We anticipated significant differences to be found in the weighting of compensable factors and salary based on participant demographics based on participant gender.*

## Method

### Sample

The sample came from voluntary participating compensation professionals and managers located in the San Francisco Bay Area in 2006/07. Participant demographics are presented in Table 27.6.

*Table 27.6 Study two: participant descriptive statistics*

Demographics	Frequency	Valid percent
Female	54	53.5
Male	47	46.5
Asian	26	25.7
African American	16	15.8
Caucasian	44	43.6
Hispanic/Latino	12	11.9
Middle Eastern	3	3.0
18–25	5	5.0
26–40	38	37.6
40–60	57	56.4
60+	1	1.0
Total	101	100.0
	Mean	Std deviation
Years work experience	20.08	9.574
Years management experience	10.46	7.710
Years compensation experience	10.76	9.295

*Table 27.7 Study two: participation by version*

	Frequency	Valid percent	AA estimate	White estimate	Hispanic estimate
Atlanta	53	52.5	5.38	4.45	2.94
Des Moines	48	47.5	2.56	6.67	2.88
Total	101	100.0	4.04	5.50	2.91

**Procedure**

The survey instrument contained five sections. Section one replicated study one, the difference being the manipulation of position location (Atlanta, Georgia or Des Moines, Iowa). Thus there were two potential forms for the participants to receive. Location was randomly assigned in the request for participation submission. (See Table 27.7.)

The second, third and fifth sections replicated study one, while the fourth section asked the professionals to estimate the proportion of the population that matched various demographic characteristics. Specifically, participants estimated the proportion of African-Americans, Caucasians, and Hispanics.

**Analyses**

To ensure that our manipulation was effective, an analysis of variance was conducted, establishing significant differences in perceived proportion of African Americans and Whites in Atlanta and Des Moines (see Table 27.8 for mean differences).

As the Hispanic manipulation was non-significant, we report only

*Table 27.8 Study two: manipulation check*

	SS	df	Mean square	<i>F</i>	Sig.
AA estimate	199.576	1	199.576	49.861	0.000
White estimate	123.449	1	123.449	30.723	0.000
Hispanic estimate	0.118	1	0.118	0.021	0.886

*Table 27.9 Study two: descriptive statistics for compensable factors and salary by location*

	Location	Mean	Std deviation	<i>N</i>
Skill	Atlanta	38.64	22.131	53
	Des Moines	33.67	14.233	48
Responsibility	Atlanta	36.85	24.113	53
	Des Moines	32.13	14.563	48
Effort	Atlanta	28.77	24.904	53
	Des Moines	20.06	9.281	48
Working Conditions	Atlanta	17.66	22.902	53
	Des Moines	11.92	8.026	48
Salary	Atlanta	5.40	2.022	53
	Des Moines	5.40	1.807	48

Table 27.10 Study two: significant MANCOVA multivariate test (Wilks' statistic)

Effect		$\Lambda$	$F$	Hypothesis df	Error df	Sig.	Partial $\eta^2$
AA estimate	Wilks' Lambda	0.789	4.813	5.000	90.00	0.001	0.211
White estimate	Wilks' Lambda	0.858	2.984	5.000	90.00	0.015	0.142

Table 27.11 Study two: significant MANCOVA between-subjects effects tests

Source	Dependent variable	Type III SS	df	Mean square	$F$	Sig.	Partial $\eta^2$
AA estimate	Responsibility	1789.786	1	1789.78	4.48	0.037	0.046
	Effort	2365.298	1	2365.29	7.01	0.009	0.069
	Salary	46.185	1	46.18	14.33	0.000	0.132
White estimate	Effort	1544.323	1	1544.32	4.581	0.035	0.046
Location	Effort	1908.452	1	1908.45	5.66	0.019	0.057

perceived African American and White populations' covariates significant results (Table 27.9).

MANCOVA was used to test the hypotheses, with compensable factors (knowledge, responsibility, effort, and working conditions) and salary serving as the dependent variables. Participant gender and labor pool location served as fixed factors (Tabachnick and Fidell, 1996).

Using Wilks' criterion, we found sizable (AA estimate partial  $\eta^2 = 0.21$ ) to medium associations (White estimate partial  $\eta^2 = 0.14$ ) between the combined dependent variables and the main effects. Table 27.10 provides a summary of the significant multivariate Wilks' Lambda test.

To identify significant main effects and interactions found in the MANCOVA, the results of the MANCOVA between-subjects effects tests were analyzed further (see Table 27.11).

## Results

H1a: When using the perceived proportion of African Americans as a covariate, significant differences were found in the weighting of the responsibility, effort compensable factors and the offered salary. When using the perceived proportion of the White estimate as a covariate, significant

differences were found in the weighting of the effort compensable factors (see Table 27.11).

H1b: We did not find support for the discriminatory weighting of compensable factors due to gender differences in the perceived labor pool.

H2: We did not find support for the discriminatory weighting of compensable factors due to gender differences in the study participant pool.

## DISCUSSION

While the study of discriminatory practices in personnel decisions at the workplace has become commonplace, and it is established that gender stereotypes existed for female employees (Heilman et al., 2004), sparse information on the interaction between gender and ethnicity in the area of job evaluation was previously available. We established that among business students, compensation specialists, and managers, job evaluation is far from equitable and affected by external factors such as perceived labor pool sex and race and internal factors such as evaluator acculturation.

We manipulated two variables in study one: ethnic salience and sex, which (either as main effects or interactions) had a significant impact on the way participants weighted compensable factors. We also established the impact of acculturation on the perceived compensable factors value. We note that for legal purposes, the directionality of discriminatory findings is irrelevant and subject to organizational sanction.

Business students generally aspire to become members of the managerial cadre. Although the first subject pool reflects non-professionals, the findings should offer business schools, particularly human resource and management professors, some pause for thought before teaching job evaluation. The finding that professional compensation specialists and managers do not significantly discriminate based on gender suggests a degree of awareness. However, once the perceived proportion of African Americans in the labor pool was controlled for, significant differences were found in the weighting of various compensable factors and offered salary.

In study number two, we established the impact of perceived racial make-up on both compensable factors and offered salary. The ramifications of discrimination in defining internal alignment at the compensable factors weighting stage for pay structure, perceived fairness and motivation are tremendous and can have an enormous impact on overall organizational productivity and success if uncovered. Internal equity discrimination can also have ramifications for vast litigation (the author was consulted by the EEOC in the use of the research for the purposes of class action lawsuits).

Both studies suggest that current job evaluation methods cannot be trusted to establish compensable factors values. To defend one's organization from inadvertent discrimination, a prejudice-reduction perspective (Devine and Monteith, 1993) should be integrated with current best practices (Chicago Area Partnerships, 2003; Henderson, 2006) from the beginning of the job evaluation (point-factor or other method) across locations to avoid discrimination. Our results suggest that theorizing has not taken into consideration intrapersonal, interpersonal social or geographic phenomena, and further conducted research should establish what is being measured in job evaluations, or ways to ensure that individual, social and group discriminatory phenomena are controlled for.

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## PART VII

### Men, masculinities, equality and diversity





## 28. Gender equality: not for women only\*

**Michael S. Kimmel**

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### INTRODUCTION

It has been nearly a century since the first official International Women's Day was celebrated in Austria, Denmark, Germany and Switzerland, organized by the great German feminist Clara Zetkin, who wanted a single day to remember the 1857 strike of garment workers in the US that led to the formation of the International Ladies Garment Workers Union. On March 19, 1911 – the date has changed since then – more than a million women and men rallied to demand the right to work, hold public office, and vote.

Think of how much has changed in that century. Throughout most, if not all of the industrial world today, women have gained the right to vote, own property in their own name, divorce, work in every profession, join the military, control their own bodies, challenge men's presumed 'right' to sexual access once married, or on a date, or in the workplace.

Indeed, the women's movement is one of the great success stories of the 20th century, perhaps of any century. It is the story of a monumental, revolutionary transformation of the lives of more than half the population. But what about the other half?

Today, the movement for women's equality remains stymied, stalled. Women continue to experience discrimination in the public sphere. They bump their heads on glass ceilings in the workplace, experience harassment and less-than-welcoming environments in every institution in the public sphere, and still must fight for control of their bodies, and end victimization through rape, domestic violence, and trafficking.

I believe that the reason why the movement for women's equality remains only a partial victory has to do with men. In every arena – in politics, the military, the workplace, professions, and education – the single greatest obstacle to women's equality is the behaviors and attitudes of men.

Changes among men represent the next phase of the movement for

women's equality – that changes among men are vital if women are to achieve full equality. Men must come to see that gender equality is in their interests – as men.

This great movement for gender equality has already begun to notice that men must be involved in the transformation. The Platform for Action adopted at the Fourth World Congress on Women, in Beijing in 1995 said 'The advancement of women and the achievement of equality between women and men are a matter of human rights and a condition for social justice and should not be seen in isolation as a women's issue'.

Four years later, a Fact Sheet entitled 'Men and Equality' from the Swedish Ministry of Industry, Employment and Communications, put it this way:

Traditionally, gender equality issues have been the concern of women. Very few men have been involved in work to achieve equality. However, if equality is to become a reality in all areas of society, a genuine desire for change and active participation on the part of both women and men are called for.

But why *should* men participate in the movement for gender equality? Simply put, I believe that these changes among men will actually benefit men, that gender equality is not a loss for men, but an enormously positive thing that will enable us to live the kinds of lives we say we want to live.

In order to make this case, I shall point to several arenas in which women's lives have changed so drastically in the past half-century, and suggest some of the issues I believe we men are currently facing as a result.

First, women have been made gender visible. Women have demonstrated the centrality of gender in social life; in the past two decades, gender has joined race and class as the three primordial axes around which social life is organized, one of the primary building blocks of identity.

This is, today, so obvious that it hardly needs mentioning. Parliaments have gender committees, and the Nordic countries even have ministers for gender equality. Every university in the US has a women's studies program. Yet just as often we forget how recent it is. The first women's studies program in the world was founded in 1972.

Second, women have transformed the workplace. Women are in the workplace to stay. Almost half the labor force is female. I often demonstrate this point to my university classes by asking the women who intend to have a career to raise their hands. All do. Then I ask them to keep their hands raised if their mother has had a career outside the home for more

than 10 years without an interruption. Half put their hands down. Then I ask them to keep their hands raised if their grandmothers had a career for ten years. Virtually no hands remain raised. In three generations, they can visibly see the difference in women's working lives.

Just 40 years ago, in 1960, only about 40 percent of European adult women of working age were in the labor force; only Austria and Sweden had a majority of working-age women in the labor force. In 1999, that percentage had grown to nearly 53 percent. (Incidentally, men's labor force participation had declined somewhat during that same period, from 75 percent in 1980 to 72 percent in 1999.)

Women's wages remain at about 83 percent of men's, and women comprise a significantly higher number of part-time workers and unemployed. Four of every five women in the labor force is in the service sector, compared with 55 percent of men.

This has led to the third area of change in women's lives: the efforts to balance work and family life. Once upon a time, not so long ago, women were forced to choose between career and family. But beginning in the 1970s, women became increasingly unwilling to choose one or the other. They wanted both. Could a woman 'have it all'? has been a pressing question in the past two decades. Could she have a glamorous rewarding career and a great loving family?

The answer, of course, was 'no'. Women could not have it all because . . . men did. It is men who have the rewarding career outside the home and the loving family to come home to. Despite their dramatic increase in labor force participation, women's time spent with children has not changed between 1965 and 1998. So if women are going to have it all, they are going to need men to share housework and childcare. Women have begun to question the 'second shift', the household shift that has traditionally been their task, after the workplace shift is over.

Finally, women have changed the sexual landscape. As the dust is settling from the sexual revolution, what emerges in unmistakably finer detail is that it has been women, not men, who are our era's real sexual pioneers. Women now feel empowered to claim sexual desire. Women can like sex, want sex. Women feel entitled to pleasure. They have learned to say yes to their own desires, claiming sexual agency.

And men? What has been happening with men while women's lives have been so utterly and completely transformed? Perhaps your reaction is like that of my students: not very much. Sure, you might say, some men have changed in some ways, but most men have not undergone a comparable revolution. This is, I think, the reason why so many men seem so confused about the meaning of masculinity these days.

But on the other hand, our lives have changed dramatically. I think

back to the world of my father's generation. Now over 80, my father could go to an all-male college, serve in an all-male military, and spend his entire working life in a virtually all-male working environment. That world has completely disappeared. In the United States, there are only three all-male colleges or universities, no more all-male military, and virtually no occupation in which a man will not have a female colleague, coworker, supervisor or boss.

So our lives have changed. But the real question is: what have men done to prepare for this completely different world? And here the answer is: not very much. What has not changed are the ideas we have about what it means to be a man. The ideology of masculinity has remained relatively intact for the past three generations. That is where men are these days: our lives have changed dramatically, but the notions we have about what it means to be a man remain locked in a pattern set decades ago, when the world looked very different.

What is that traditional ideology of masculinity? In the mid-1970s, an American psychologist offered what he called the four basic rules of masculinity:

1. 'No Sissy Stuff' Masculinity is based on the relentless repudiation of the feminine. Masculinity is never being a sissy.
2. 'Be a Big Wheel' We measure masculinity by the size of the paycheck. Wealth, power, status are all markers of masculinity. As a US bumper sticker put it: 'He who has the most toys when he dies, wins'.
3. 'Be a Sturdy Oak' What makes a man a man is that he is reliable in a crisis. And what makes him reliable in a crisis is that he resembles an inanimate object. A rock, a pillar, a tree.
4. 'Give 'em Hell' Also exude an aura of daring and aggression. Take risks; live life on the edge. Go for it.

The past decade has found men bumping up against the limitations of that traditional definition, but without much of a sense of direction about where they might go to look for alternatives. We chafe against the edges of traditional masculinity, but seem unable or unwilling to break out of the constraints we feel by those four rules. Thus the defensiveness, the anger, the confusion that is everywhere in evidence.

These limits will become most visible around the four areas in which women have changed most dramatically: making gender visible, the workplace, the balance between work and home, and sexuality. They suggest the issues that must be placed on the agenda for men, and a blueprint for a transformed masculinity.

Let me pair up those four rules of manhood with the four arenas of change in women's lives and suggest some of the issues I believe we are facing around the world today.

## MAKING GENDER VISIBLE

First, though we now know that gender is a central axis around which social life revolves, most men do not know they are gendered beings. Courses on gender are still populated mostly by women. Those gender studies books on every university press list are still read virtually entirely by women.

I often tell a story about a conversation I observed in a feminist theory seminar that I participated in about a decade ago. A white woman was explaining to a black woman how their common experience of oppression under patriarchy bound them together as sisters. All women, she explained, had the same experience as women.

The black woman demurred from quick agreement. 'When you wake up in the morning and look in the mirror', she asked the white woman, 'what do you see?'

'I see a woman,' responded the white woman hopefully.

'That's the problem,' responded the black woman. 'I see a black woman. To me race is visible, because it is how I am not privileged in society. Because you are privileged by race, race is invisible to you. It is a luxury, a privilege not to have to think about race every second of your life'.

I groaned, embarrassed. And, as the only man in the room, all eyes turned to me. 'When I wake up and look in the mirror,' I confessed, 'I see a human being. The generic person. As a middle-class white man, I have no class, no race and no gender. I'm universally generalizable. I am Everyman'.

Lately, I have come to think that it was on that day in 1980 that I *became* a middle-class white man, that these categories actually became operative to me. The privilege of privilege is that the terms of privilege are rendered invisible. It is a luxury not to have to think about race, or class, or gender. Only those marginalized by some category understand how powerful that category is when deployed against them.

Here is another example of this invisibility. Recently, I was invited to be a guest lecturer in a course on Sociology of Gender taught by one of my female colleagues. As I entered the lecture hall, one student looked up from her notes and exclaimed, 'Finally, an objective opinion'. Now, I am neither more nor less 'objective' than my colleagues, but, in this

student's eyes, I was seen as objective – the disconnected, disembodied, deracinated, degendered, voice of scientific and rational objectivity. I am what objectivity looks like! (One ironic result is that I could probably say more outlandish things in a classroom than my female colleagues could. If a female, or African-American, professor were to make a statement such as, 'White men are privileged in American society', our students might respond by saying, 'Of course you'd say that. You're biased'. They would see such a normative statement as revealing the inherent biases of gender or race, a case of special pleading. But when I say it? As objective fact, transmitted by an objective professor, they will probably take notes.)

Let me give you one final example of how privilege is invisible to those who have it. Probably every reader of this chapter uses email, and you write email messages to people all over the world. You have probably noticed that there is one big difference between those in the United States and those of people in other countries: the latter have 'country codes' at the end of the address. So, for example, if you were writing to someone in South Africa, you would put 'za' at the end, or 'jp' for Japan, or 'uk' for England (United Kingdom) or 'de' for Germany (Deutschland). But when you write to people in the United States, the email address ends with 'edu' for an educational institution, 'org' for an organization, 'gov' for a federal government office, or 'com' or 'net' for commercial Internet providers. So, when I correspond with the editor of this book, I write his email address as . . . @usa.ac.uk – that is, his university, the 'academic' element, and the fact that it is in the UK. But when he writes to me, it is . . . @stonybrook.edu. No (dot)us. Why is it that the United States does not have a country code?

It is because when you are the dominant power in the world, everyone else needs to be named. When you are 'in power', you need not draw attention to yourself as a specific entity, but, rather, you can pretend to be the generic, the universal, the generalizable. From the point of view of the United States, all other countries are 'other' and thus need to be named, marked, noted. Once again, privilege is invisible. In the world of the Internet, as Michael Jackson sang, 'we are the world'.

Becoming aware of ourselves as gendered, recognizing the power of gender as a shaping influence in our lives, is made more difficult by that first rule of manhood – No Sissy Stuff. The constant, relentless efforts by boys and men to prove that they are 'real men' and not sissies or weak or gay is a dominant theme, especially in the lives of boys. As long as there is no adequate mechanism for men to experience a secure, confident and safe sense of themselves as men, we develop our own methods to 'prove it'. One of the central themes I discovered in my book, *Manhood in America*

(Kimmel, [1996] 2006) was the way that American manhood became a relentless test, a constant, interminable demonstration.

As a culture, we must make gender visible, and give young boys and men the means to develop a secure, confident, inner sense of themselves as men. Only then will we be able to breathe a sigh of relief.

## THE WORKPLACE

The second arena in which women's lives have changed is the workplace. Recall the second rule of manhood: Be a Big Wheel. Most men derive their identity as breadwinners, as family providers. Often, though, the invisibility of masculinity makes it hard to see how gender equality will actually benefit us as men. For example, while we speak of the 'feminization of poverty' we rarely 'see' its other side – the 'masculinization of wealth'. While in the US women's wages are expressed as a function of men's wages – so we read that women earn 70 cents for every man's dollar – what is concealed is what we might see if women's wages were the norm against which men's were measured. Men, on average, earn \$1.42 for every dollar women earn. Now suddenly privilege is visible!

On the other hand, the economic landscape has changed dramatically. And currently, the economy has not necessarily been kind to most men either. The great global expansion of the 1990s affected the top 20 percent of the labor force. There are fewer and fewer 'big wheels'. European countries have traded growth for high unemployment, which will mean that more and more men will feel as though they have not made the grade, will feel damaged, injured, powerless, men who will need to demonstrate their masculinity all over again.

Now, remember: here come women into the workplace in unprecedented numbers. Just when men's economic breadwinner status is threatened, women appear on the scene as easy targets for men's anger. Recently I appeared on a television talk show opposite three 'angry white males' who felt they had been the victims of workplace discrimination. The show's title, no doubt to entice a large potential audience was 'A Black Woman Took My Job'. In my comments to these men, I invited them to consider what the word 'my' meant in that title, that they felt that the jobs were originally 'theirs', that they were entitled to them, and that when some 'other' person – black, female – got the job, that person was really taking 'their' job. But by what right is that his job? Only by his sense of entitlement, which he now perceives as threatened by the movement towards workplace gender equality.

It is also this context in which we must consider the question of sexual



harassment. Sexual harassment in the workplace is a distorted effort to put women back in their place, to remind women that they are not equal to men in the workplace, that they are, still, just women, even if they are in the workplace. Sexual harassment is a way of maintaining that sense of entitlement, of maintaining the illusion that the public sphere really belongs only to men. Sexual harassment is a way to remind women that they are not yet equals in the workplace, that they really do not belong there.

Every major corporation law firm, and university is scrambling to implement sexual harassment policies, to make sure that sexual harassment will be recognized and punished. This usually consists of explaining what sexual harassment is, and, for the men, how to avoid doing it, and, for the women, what to do if it happens to you. But our challenge is greater than admonition and *post hoc* counseling. Our challenge will be to prevent sexual harassment *before* it happens.

And that will require that we demonstrate to men what men will gain by supporting women's efforts to end sexual harassment. Not only because sexual harassment is enormously costly – as increased rates of absenteeism, higher job turnover, retraining costs and lower productivity are just some of the results. But if you are a manager, *your* job performance depends on the strong performance of those who report to you. You should want everyone who works for you to feel comfortable, at their best, able to really produce. And thus it is in your interest as a man to make sure that everyone who works for you – male and female – feels comfortable, confident and safe in the workplace. Sexual harassment hurts women by reducing women's productivity. But it also hurts men because it hurts the women we work with, and therefore reduces *our* ability to work at our best as well.

## BALANCING WORK AND FAMILY

It is also in our interests as men to begin to better balance work and family life. We have a saying in the US that 'no man on his deathbed ever wished he spent more time at the office'.

But remember the third rule of manhood – Be a Sturdy Oak. What has traditionally made men reliable in a crisis is also what makes us unavailable emotionally to others. We are increasingly finding that the very things that we thought would make us real men impoverish our relationships with other men and with our children.

Fatherhood, friendship, partnership all require emotional resources that have been, traditionally, in short supply among men, resources such

as patience, compassion, tenderness, attention to process. A 'man isn't someone you'd want around in a crisis', wrote the actor Alan Alda, 'like raising children or growing old together' (Beneke, 1982: 71).

In the United States, men become more active fathers by 'helping out' or by 'pitching in' and by spending 'quality time' with their children. But it is not 'quality time' that will provide the deep intimate relationships that we say we want, either with our partners or with our children. It is *quantity time* – putting in those long, hard hours of thankless, unnoticed drudge work. It is quantity time that creates the foundation of intimacy. Nurture is doing the unheralded tasks, like holding someone when they are sick, doing the laundry, the ironing, washing the dishes. After all, men are capable of being surgeons and chefs, so we must be able to learn how to sew and to cook.

Workplace and family life are also joined in the public sphere. Several different kinds of policy reforms have been proposed to make the workplace more 'family friendly' – to make the workplace more hospitable to our efforts to balance work and family. These reforms generally revolve around three issues: on-site childcare, flexible working hours, and parental leave. But how do we usually think of these family-friendly workplace reforms? We think of them as *women's* issues. But these are not women's issues, they are *parents'* issues, and to the extent that we, men, identify ourselves as parents, they are reforms that *we* will want. Because they will enable us to live the lives we say we want to live. We want to have our children with us; we want to be able to arrange our work days to balance work and family with our wives and we want to be there when our children are born.

On this score, we Americans have so much to learn from Europeans, especially from the Nordic countries, which have been so visionary in their efforts to involve men in family life. In Sweden, for example, men are actively encouraged by state policies to take parental leave to be part of their children's first months. Before the institution of 'Daddy Days' less than 20 percent of Swedish men took any parental leave at all. Today, though, the percentage of men who do has climbed to over 90 percent. That is a government that has 'family values'. Italy recently included such 'use or lose' schemes in its parental leave policy to encourage men, and it will be interesting to watch their rates of participation soar.

Yet we have so much more to do. The total percentage of paid parental leave days taken by fathers amounts to less than 10 percent across the European welfare states and less than 3 percent in close to half.

We understand our marriages to be 'dual career marriages'. But we must also come to see our marriages as 'dual carer' marriages. Dual career, and dual carer. This requires active participation from men.

## SEXUAL EQUALITY

Finally, let us examine the last rule of manhood – Give 'em Hell – What this says to men is to take risks, live dangerously. It means we have to talk about sex and violence.

Remember that the greatest change in sexuality over the past 40 years has been among women. Just when women are saying 'yes' to their own sexual desires, however, there is an increased awareness of the problem of rape all over the world, especially of date and acquaintance rape. In one recent US study, 45 percent of all college women said that they had had some form of sexual contact against their will, and a full 25 percent had been pressed or forced to have sexual intercourse against their will. When one psychologist asked freshmen men over the past 10 years if they would commit rape if they were certain they could get away with it, almost one-half said they would.

Ironically, when men speak of rape they do not speak with a voice of power, control, domination. Listen, for a moment to a 23-year-old man in San Francisco, who was asked to think about under what circumstances he might commit rape. He has never committed rape. He is simply an average guy, considering the circumstances under which he would commit an act of violence against a woman. Here is what he says:

Let's say I see a woman and she looks really pretty and really clean and sexy and she's giving off very feminine, sexy vibes. I think, wow I would love to make love to her, but I know she's not interested. It's a tease. A lot of times a woman knows that she's looking really good and she'll use that and flaunt it and it makes me feel like she's laughing at me and I feel degraded . . . If I were actually desperate enough to rape somebody it would be from wanting that person, but also it would be a very spiteful thing, just being able to say 'I have power over you and I can do anything I want with you' because really I feel that they have power over me just by their presence. Just the fact that they can come up to me and just melt me makes me feel like a dummy, makes me want revenge. They have power over me so I want power over them. (Beneke, 1982: 67)

Notice how the stockboy also speaks not with the voice of someone in power, of someone in control over his life, but rather with the voice of powerlessness, of helplessness. For him, violence is a form of revenge, a form of retaliation, of getting even, a compensation for the power that he feels women have over him.

I think that perspective has been left out of our analyses of men's violence, both at the interpersonal, micro level of individual acts of men's violence against women – rape and battery, for example – and the aggregate, social and political analysis of violence expressed at the level of the nation state, the social movement, or the military institution. Violence

may be more about getting the power to which you feel you are entitled than an expression of the power you already think you have.

I believe that we must see men's violence as the result of a breakdown of patriarchy, of entitlement thwarted. Again and again, what the research on rape, on domestic violence finds is that men initiate violence when they feel a loss of power to which they felt entitled. Thus he hits her when she fails to have the dinner ready, when she refuses to meet his sexual demands, that is, when his power over her has broken down – not when she has dinner ready or is willing to have sex, which are, after all, expressions of his power and its legitimacy.

And this question of entitlement lies at the heart of current controversies over sex trafficking all over the world. As we have tried to confront this new international problem, we have focused on 'supply' – especially the international cartels who often kidnap and imprison young girls and women – and, of course, extended our compassion for the 'product', the women themselves. But few, if any, policies have targeted the 'demand' side of the equation, policies that might be aimed at the men who are the consumers of these purloined and oppressed products. Why? Because we somehow understand that men feel entitled to consume women's bodies, however they might be supplied.

Nearly 20 years ago, anthropologist Peggy Reeves Sanday (1981) proposed a continuum of propensity to commit rape upon which all societies could be plotted – from rape prone to rape free. (For the curious, by the way, the United States was ranked as a highly rape-prone society, far more than any country in Europe; Norway and Sweden were among the most rape free.) Sanday found that the single best predictors of rape-proneness were (i) whether the woman continued to own property in her own name after marriage, a measure of women's autonomy; and (ii) father's involvement in child-rearing, a measure of how valued parenting is, and how valued women's work.

So clearly here is an arena in which women's economic autonomy is a good predictor of their safety – as is *men's* participation in child-rearing. If men act at home the way we say we want to act, women will be safer.

Surely, these questions of violence and sexuality are an arena where we need strong measures to make clear our intolerance for date and acquaintance rape, laws that protect women, social attitudes that believe women who do come forward. And here, also, is another arena in which men's support of feminism will enable men to live the lives we say we want to live. If we make it clear that we, as men, will not tolerate a world in which women do not feel safe, and if we make it clear to our individual partners that we understand that no means no, then – and only then – can women begin to articulate the 'yes' that is also their right.

## CONCLUSION

Rather than resisting the transformation of our lives that gender equality offers, I believe that we should embrace these changes, both because they offer us the possibilities of social and economic equality, and because they also offer us the possibilities of richer, fuller, and happier lives with our friends, with our lovers, with our partners, and with our children. We, as men, should support gender equality – both at work and at home. Not because it is right and fair and just – although it is those things. But because of what it will do for us, as men. At work, it means working to end sexual harassment, supporting family-friendly workplace policies, working to end the scourge of date and acquaintance rape, violence and abuse that terrorize women in our societies. At home it means sharing housework and childcare, as much because our partners demand it as because we want to spend that time with our children and because housework is a rather conventional way of nurturing and loving.

The feminist transformation of society is a revolution-in-progress. For nearly two centuries, we men have met insecurity by frantically shoring up our privilege or by running away. These strategies have never brought us the security and the peace we have sought. Perhaps now, as men, we can stand with women and embrace the rest of this revolution – embrace it because of our sense of justice and fairness, embrace it for our children, our wives, our partners, and ourselves.

Nearly a century ago, 15,000 American women marched in New York demanding better pay, shorter working hours, the right to vote and an end to child labor. They summed up their demands with the memorable phrase ‘Bread and Roses’ – they wanted both economic security and a better quality of life. *Both* money *and* beauty, they believed, were necessary for a sustainable life. Three years later, a million women and men marched together in European cities marking the first International Women’s Day.

Now, perhaps, men are also coming to realize that gender equality is in our interests as men, that we will benefit from gender equality. That gender equality holds out a promise of better relationships with our wives, with our children, and with other men.

Bread and Roses. Only when we men share in the baking of the bread will we be able to smell the roses.

## NOTE

\* This chapter is based on a lecture delivered on International Women’s Day, at the European Parliament, Brussels, 8 March 2001.

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## 29. Men, diversity at work and diversity management

**Jeff Hearn and David L. Collinson**

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### INTRODUCTION

Men's relation to equality, diversity and inclusion at work is often strangely unspoken and in many ways problematic (also see Chapter 30 in this volume, 'Men, gender equality and gender equality policy'). There may be strong debates *promoted* by (some) men on questions of race, ethnicity and equality supposedly 'in general', but the explicit positioning and relation of men to diversity and diversity management are usually implicit and unspoken (Hearn and Collinson, 2005).

### MEN, POWER AND DIVERSITY IN WORKPLACES

Organizations are an important site for the reproduction of men's power, culture and status. Workplace processes such as control, decision making, selection, remuneration, promotion and culture change frequently reflect and reinforce masculine material discursive practices. As entrepreneurs, innovators, owners, chief executives, board members, managers, supervisors, team leaders, administrators, trade unionists, manual workers and unemployed workers, men have been prominent in the formation, development and change of organizations.

Men and masculinities are often formed and constructed in organizational processes such as competition, collaboration, innovation, conformity and resistance. Hence diverse men and various masculinities frequently inhabit and are located within diverse organizations. Yet, even critical studies of men and masculinity have, rather strangely, underestimated the significance of organizations as sites of men's power and masculinities. It may be that in the effort to see men and masculinities 'differently', the more obvious associations of men and (paid) work have been played down.

A growing number of studies have made explicit the gendering of men and masculinities in workplaces. Emphasizing paid work as a central

source of men's identity, status and power, feminist organizational studies (Pringle, 1988; Cockburn, 1991) have demonstrated how 'most organizations are saturated with masculine values' (Burton, 1991: 3). They have critically analysed the centrality of masculine models of lifetime, full-time, continuous employment and shown how masculine assumptions are embedded in organizational structures, cultures and practices. For many men, employment continues to provide resources and symbolic benefits that mutually reinforce their power and authority at 'work' and at 'home', and in the relations of home and work. Men have been shown to exercise control over women, through, for example, job segregation, pay inequities, use of authority, discrimination, and harassment.

Organizational studies focusing on men include those on relations of bureaucracy, men and masculinities (Sheppard, 1989; Bologh, 1990; Morgan, 1996); transformations in managerial masculinities (Roper, 1991, 1994); the continuing numerical dominance of men, especially at the highest levels (Davidson and Burke, 2000); management-labour relations reconceptualized as interrelations of masculinities (Collinson, 1988, 1992); managerial identity formation processes (Kerfoot and Knights, 1993); and masculine models, stereotypes and symbols in management. It has also been noted how men, especially in mixed working situations, like other 'members of dominant and status identity groups typically display more aggressive nonverbal behaviours, speak more often, interrupt others more often, state more commands and have more opportunity to influence' (Merrill-Sands et al., 2003: 334<sup>1</sup>).

## DIVERSE GENDERINGS OF MEN AND MASCULINITIES IN WORKPLACES

Analyses of men in organizations shed light on workplace power relations and demonstrate the diversity of masculinities (Collinson and Hearn, 2000). For example, distinctions between hegemonic, complicit and subordinated masculinities suggest that some masculinities (for example, white, middle-class, middle-aged, heterosexual, Christian, able-bodied) often dominate others (for example, working class or gay). These former masculinities tend to predominate, at least ideologically, in powerful leadership and managerial positions, while others are subordinated. While many groups of men at work have been researched, some forms of diversity among men, such as age and disability, remain underexplored. The diversity of masculinities is also partly shaped by different forms and sites of work and masculinity (Collinson and Hearn, 1996), varying by, for example, industry, class and organizational type.



Initially, critical empirical research on men and masculinities in organizations tended to concentrate on those in subordinate positions, particularly working-class and manual workers, and their relation with men and women in middle-class and other class positions (Cockburn, 1983; Collinson, 1992; Morgan, 2005). In due course further emphasis has been developed on other differences in class, status, hierarchy, function and occupation, and also on sexuality, age, disabilities and other divisions (for example, Hearn and Parkin, 1995, 2001).

## RACIALIZATION AND ETHNICITY

It is often the case that those in subordinate positions are made 'other'; they are initially recognized as socially constructed in an explicit relation to the social division in question. This has been so for ethnic minority men, men of colour and black men. There is a large research and policy literature on discrimination against (and wage gap of) such men compared with the ethnic majority or white men. Racial oppressions and discriminations bring negative health effects (Krieger and Sidney, 1996; Landrine and Klonoff, 1997). 'Accumulations of microaggressions' can affect the self-confidence and self-respect of those targeted (Benokraitis, 1998: 8–10).

The intersection of racial and ethnic disadvantage and diversity with gender and masculinities produces complex dynamics. Men's experience of ethnic and racial subordination may contradict their gender advantage relative to women of similar ethnicity or racialization (McGuire and Reskin, 1993; Edmondson Bell and Nkomo, 2001). Men's experience of social subordination may challenge forms of masculinity that assume established claims of privilege and advantage (Eveline, 1994). Similar contradictions may persist in workplaces in the relation of minority ethnic men and black men to white and ethnic majority women, who may indeed be supervisors, managers or leaders. At the same time, there are gradually growing numbers of ethnic minority men, black men, and men of colour entering supervision and management, especially lower and middle management in some sectors and countries. All these relative marginalizations by ethnicity and racialization may be compounded by class, nationality, language, religion and other diversities, discriminations and oppressions.

As with heterosexual masculinities, and indeed in some senses men and masculinities more generally, forms of whiteness and white masculinities are characteristically left invisible, taken-for-granted, assumed but unstated – an absent but present privilege (McIntosh, 1990). Future work needs to analyse and critique white masculinities at work, and how they intersect with age, class, nationality and nationalism, racism and racialization, religion

and so on – in effect to deconstruct the dominant (Hearn, 1996, 2004a). Postcolonialism in its many forms challenges unified white Western male positionality. Accordingly, categories of white men, WHAMs (white, heterosexual able-bodied men), and so on need to be part of the analysis (Hearn and Collinson, 1994). Alongside this argument for the critique of white masculinities, it is also necessary that black and non-white masculinities should be critically examined too; oppressions can occur in multiple ways.

## CULTURE AND TRANSNATIONALIZATION

Men and masculinities at work exist within, and moreover constitute, various forms of culture: team/group, work, organizational, national, regional and transnational. It is important to see various cultures as contested and complex, and frequently hybrid, rather than as pre-existing fixed contexts in which men work and live. Multiple workplace masculinities may also be shaped by national and regional cultures. Woodward (1996) reveals how international organizations such as the European Commission are gendered bureaucracies with the ‘male’ norm dominant and masculine practices of resistance to female leadership. With globalization of management and increasing transnationalization of organizations and managerial work, the social form and construction of specific men and masculinities are likely to impact even more on management and organizations (Hearn et al., 2006, 2008).

Connell (2001) has analysed the form of transnational business masculinity that may be increasingly hegemonic and directly connected to patterns of world trade and communication dominated by the West and the global ‘North’, as opposed to the ‘South’. This masculinity is marked by egocentrism, precarious and conditional forms of loyalty, declining sense of responsibility, and sexual libertarianism. Dominant or dominating forms of transnational masculinity are themselves open to deconstruction (Hearn, 1996). There are an immense number of issues around men and masculinities to be explored in the field of international management and international human resource management (HRM), including men’s homosocial relations, mergers and acquisitions, supply chains and so on (Hearn et al., 2006).

## DIVERSITY MANAGEMENT, GENDER EQUALITY AND EQUAL OPPORTUNITIES POLICY

Current debates on diversity and diversity management in organizations and indeed problematizations of diversity need to conceptualize men.

Most mainstream approaches to international and transnational management, that one might think are centrally about diversity, are silent on conceptualizing men (Bartlett and Ghoshal, 2000; Holden, 2002; Punnett and Shenkar, 2004; compare Hearn, 2004b). Gender analysis is often absent from mainstream texts and when it is introduced, it is often in a very limited way. For example, discussions of gender in international HRM are sometimes reduced to questions of women as expatriates (Dowling and Welch, 2004; Harris, 2004; Harzing and Van Ruysseveldt, 2004).

Studies of diversity also frequently neglect issues of power and identity. Foldy (2003) reveals the importance of workplace power dynamics for understanding diversity. She shows how power relations influence identity construction in the context of diversity training, affinity groups and mentoring programmes. Foldy suggests that organizations play a particularly important part in shaping workplace identity by classifying, categorizing, distributing and acculturating individuals and groups. Diversity programmes directly address identity issues, and identity in turn is a key site for the reproduction of power relations. On the one hand, by opening up the terrain of identity, diversity programmes invite the possibility of creative change and resistance. Extra-organizational identities such as race or gender can be a source of resistance to existing power relations. But on the other hand, diversity programmes that seek to 'empower' employees may also be designed to harness and incorporate the very identities that can otherwise be the basis of resistance in organizations. Foldy's focus on the fundamentally interwoven nature of power, identity and diversity can be usefully developed by a closer analysis of men and masculinity.

Moving beyond mainstream silences and very partial approaches to a wider power-based understanding of diversity and diversity management involves analysing men as a social group or social category, differences among men, and their interrelations. Such contradictory diversities regarding men impact upon both the identities of organizational members and organizational cultures. In this sense, diversity management can be understood as part of gendered management. This involves the simultaneous deconstruction of men/masculinities and management in the context of patriarchy. As leaders and managers, men's control and authority may be more contradictory and heterogeneous than it often appears.

The hierarchical, gendered power of men managers and leaders is by no means homogeneous, monolithic or inevitable. Delaying and intensification of managerial work may problematize the view that management constitutes the clearest form of hegemonic masculinity (Collinson and Collinson, 1997, 2004). Power relations are complex and shifting, sometimes mutually reinforcing, on other occasions cross-cutting with countervailing and contradictory effects (Collinson, 2005). First, tensions

can arise from the various divisions and differences within management itself, in terms of hierarchical, spatial and functional differentiations, and tensions between formulation of corporate policy and its implementation. Strategic solutions to management's control problem may compete and be fragmented. Diversity management can be part of these internal divisions and contradictions.

Second, management is set within complex tensions between ownership and control, technological and social relations. Alongside antagonistic relations between capital and labour is a coexisting and contradictory interdependence limiting managerial power. Employers' contradictory demands for both dependable, yet disposable workers result in changing emphases, first, upon managerial prerogative and coercion (scientific management), and second, upon worker cooperation and consent (human relations) as product and labour market conditions shift. Diversity management is generally understandable as part of the latter strategy. Yet neither of these two strategies can fully reconcile the contradiction between control and coordination in the capital-labour relation. Management control is constrained by its contradictory relationship with labour, and is also highly gendered. Diversity management can also be understood as part of the gendered construction and operation of management, indeed increasingly mainstream management. This involves diversity management being developed as part of (strategic) HRM, alongside and often in distinction from the 'main mission' of supposedly agendered strategic corporate management.

Third, tensions can occur between different men and masculinities. Management differentiates men, both between managers and non-managers, and between different types of managers. Managerial masculinities might be understood as forms of hegemonic masculinity. Tensions may also exist between hegemonic managerial authority and diverse managerial masculinities, as well as between male managers aspiring to senior leadership positions. Again, diversity management can be implicated in such diverse ways of being men. Differences within and among management, men and masculinities may be intertwined with other social differences, such as age, class, ethnicity, locality, nationality and religion.

These interwoven tensions highlight the complex conditions, processes and consequences of managerial control in the workplace. They question conventional assumptions regarding managerial power and reveal the analytical importance of similarities and differences between men, masculinities and managements. Equally, they consider how the power of 'men as managers' and 'managers as men' is circumscribed in various ways. Yet despite the potentially counterproductive effects of the exercise of gendered, hierarchical power, the preoccupation with control over both

women and labour by men as managers and as leaders continues to characterize many routine workplace practices, including diversity management.

In these various complex ways, diversity management can, at one level, be conceptualized as a men's/managerial project. It can be used to downplay gender and men's gender power, and a means of diversion from gender relations by focusing on a 'diversity' that can mean everything, anything or nothing. In another sense, diversity management and programmes might be seen as a contradictory gender project, both incorporating gender and other social divisions into mainstream agendas, and having the potential to be fundamentally deconstructive and threatening to men's hegemonic power.

As with multiculturalism (McLaren, 1994), there are various ways of both promoting and conceptualizing diversity management that are less or more challenging to existing power structures, including gender power (Prasad and Mills, 1997; Prasad et al., 1997). And just as Susan Moller Okin (1997) posed the question 'Is multiculturalism bad for women?', so we might add 'Is multiculturalism – or diversity – good for men?', that is, in obscuring men's power and promoting men's dominant interests.

The various approaches to diversity include those based on cognitive–functional, cultural, or social differences (Merrill-Sands et al., 2003). Furthermore, variations in the theory and practice of diversity management overlap with variations in the theory and practice of gender and equality interventions. Thomas and Ely's (1996)<sup>2</sup> and Kirton and Greene's (2005)<sup>3</sup> discussions of alternative, more or less radical approaches to diversity and their possible limitations resonate with Fletcher and Ely's (2003) and Kolb et al.'s (2003) fourfold framework of 'fixing the women', 'celebrating differences', 'creating equal opportunities' and 'revising work culture', which presents various forms of more or less fundamental engagements with gender arrangements (Ely and Foldy, 2003).

## DIVERSITIES AND COMMONALITIES

In these various frameworks there are crucial questions about who constructs 'diversity'? Who defines diversity? Who decides? And which forms of diversity are legitimate (Cockburn, 1991)? This can be seen as part of the interrogation of dominant organizational cultures and as part of the long agenda of equal opportunities. It necessitates attention to categories of white men, such as WHAMs, in analysis and policy. We can also ask which men and masculinities are favoured and disfavoured in diversity programmes – in their setting up, management and control, and their implementation, consumption and effects. These implications clearly affect both women and men

in the organizations concerned. Diversity management and programmes may also provide space for the development of further paradoxes around men and differential forms of power. An example would be the enactment of some men's racism against other men. These contradictions can also be reproduced in the detailed structure and practices of diversity management and diversity programmes, such as the discriminatory practice of asking training programme participants to speak on behalf of a subordinated category, such as 'black people', to which they happen to belong.

Men's power is partly maintained through their commonalities with each other. Typically, men are bound together, not necessarily consciously, by shared interests and meanings, sexuality, socio-economic power, and representational privileging. Men's collective power persists partly through the assumption of hegemonic forms of men and masculinities, often white, heterosexual and able-bodied, as the primary form, to the relative exclusion of subordinated men and masculinities. A focus on multiplicity, multiculturalism and diversity among men and masculinities, especially if seen only in terms of some men's disadvantage, can bring dangers of excluding other social divisions and power inequalities in organizations and failing to appreciate the interrelations of these divisions and inequalities. Indeed one of the most fundamental forms of diversity that exists within organizations arises from hierarchical power differences within organizations, and the diversities among men in those organizational hierarchies. These entrenched diversities are indeed often missing from debates on diversity and diversity management.

Finally, in considering diversity among men and masculinities, we need to note that hegemonic, subordinated and diverse masculinities change over time, can be shaped by ambiguities, differ by age, class, ethnicity and other social divisions, and be central in reproducing social divisions. It is vital to analyse intersections of gender (men) and diversities of age, class, culture, disability, ethnicity, religion, language, race and sexuality. Yet, an emphasis upon multiplicity in diversity management ought not to degenerate into a pluralism that gives insufficient attention to gendered power and inequality. While attention to diversity is certainly needed, this should not be at the expense of critiquing structured asymmetrical power relations between men and women.

As Cockburn wrote, focusing upon multiple masculinities should not 'deflect attention from the consistency in men's domination of women at systemic and organizational levels, from the continuation of material, structured inequalities and power imbalances between the sexes' (1991: 225). The key challenge is to maintain this focus on difference without neglecting gender and other structural powers (Foldy and Creed, 1999; Holvino, 2003).

## NOTES

1. Citing Canney Davison and Ward, 1999; and Sessa and Jackson, 1995.
2. Thomas and Ely outline three paradigms: discrimination and fairness; access and legitimacy; and learning and effectiveness.
3. Kirton and Greene discuss liberal (fair equal opportunity, positive action, or strong positive action), radical, and managing diversity equality initiatives.

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## 30. Men, gender equality and gender equality policy

**Jeff Hearn**

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### INTRODUCTION

How do we think about and understand men's relation to and involvement with gender equality at work? What are the different kinds of relationship that men have to gender equality? Why is gender equality of interest to some, often relatively few, men? Why is it not of interest to some, often many, men? What are the theoretical, political, policy and practical reasons why it is important for men to become involved in these issues? How is this to be done? What are the promises, dangers and implications of these developments?

Such questions take us to the very heart of assumptions, understandings, politics and ideologies about gender equality, and even the very notion of gender. In many countries and many workplaces gender equality is still seen as 'women's business'. Gender equality, as usually understood, does not necessarily problematize men; it may adopt the 'short agenda' (Jewson and Mason, 1986; Cockburn, 1989, 1990) of seeking to elevate women to the way men are, rather than seeking more fundamental change in and beyond workplaces.

There is a profound need, both analytical and political, for men to understand men's broad relation to gender inequality and equality. While men are collectively and individually located as powerful in relation to women, these are not fixed or monolithic structures of power. Indeed, part of the structuring of patriarchy is the maintenance of relations of power between men, by age, class, ethnicity, sexuality and other divisions. Some subordinated men may also be discriminated against, rarely directly as men, but more often by virtue of social divisions, or through their association with aspects of gender or gender relations that are valorized, such as by being defined as gay or as supportive of women or feminism.

To view, indeed to problematize, gender equality in this way is not a matter of adding 'the male perspective' or a 'male liberation' perspective to an existing notion of gender equality. To do this would be comparable

to adding 'the white perspective' to racial/ethnic equality in a racist society, and is as such antagonistic to equality. Rather, it means fundamentally rethinking what gender equality is, who defines its framing, and how this translates to practical actions (Hearn, 2006).

In this chapter I first outline some indications of growing interest around men and gender equality, before noting the relevance of recent critical studies on men and masculinities. This is followed by more extended discussions of men's positionings on gender equality, and men, gender equality and gender equality policy in workplaces.

## A GROWING INTEREST FROM AND ON MEN?

Yet, men seem to be becoming slowly more interested in gender equality. For example, if we take the Finnish case, according to the national *Gender Equality Barometer 2004* (Melkas, 2005), while only 8 per cent of men surveyed (compared with 21 per cent of women) think that the status of men is clearly better than that of women (p. 7), almost half (46 per cent) fully agree that men benefit from increased gender equality, as well as women (p. 8). But, do these kinds of general attitudes translate into men's interest in gender politics and gender equality politics?

At the international level there are also growing concerns. In 1995, The Platform for Action adopted at the Fourth World Conference on Women read:

The advancement of women and the achievement of equality between women and men are a matter of human rights and a condition for social justice and should not be seen in isolation as a women's issue. . . . The Platform for Action emphasises that women share common concerns that can be addressed only by working together and in partnership with men towards the common goal of gender equality around the world. (United Nations, 2001)

Since 1995, these issues have increasingly been taken up in the UN and its various agencies and in other transgovernmental organizations' policy discussions, such as the European Union. In 2003, the UN's Division for the Advancement of Women organized a worldwide online discussion forum and expert group meeting in Brasilia on the role of men and boys in achieving gender equality as part of its preparation for the 48th session of the Commission on the Status of Women, with the following comments:

Over the last decade, there has been a growing interest in the role of men in promoting gender equality, in particular as the achievement of gender equality

is now clearly seen as a societal responsibility that concerns and should fully engage men as well as women. (Division for the Advancement of Women, United Nations, 2003)

The UN Division for the Advancement of Women has indeed been active in promoting '[t]he role of men and boys in achieving gender equality'. Focusing on men in developing gender equality policy at work appears to have become more popular in recent years. In some ways this is not anything special, and not necessarily, in itself, linked to any radical project of social change and transformation. Indeed there have long been workplace and state policies on men and masculinity, such as conscription and occupational segregation policies. It all depends how developing policies on men and men's practices is done:

- Are workplace policies, especially gender equality policies, developed explicitly or implicitly in relation to men, or are they done in passing?
- In such policy processes are men seen as gendered or non-gendered?
- Are workplace policies related to feminist and other critical gender research and policy development?
- According to what assumptions about men, women and gender?
- And with different relations, or lack of relations, to the various approaches to gender equality?

## STUDIES ON MEN AND MASCULINITIES

Considering such issues is usefully informed by recent international social science perspectives in studies on men and masculinities. This necessarily involves a number of different national, disciplinary and methodological traditions. While not wishing to play down debates and differences between recent traditions in studying men, the broad, critical approach to men and masculinities (for example, Kimmel et al., 2005) that has developed in recent years can be characterized in a number of ways, in terms of:

- a *specific*, rather than an implicit or incidental, *focus* on men and masculinities;
- taking account of *feminist, gay, and other critical gender scholarship*;
- recognizing men and masculinities as *explicitly gendered* rather than non-gendered;

- understanding men and masculinities as *socially constructed, produced, and reproduced* rather than as somehow just ‘naturally’ one way or another;
- seeing men and masculinities as *variable and changing* across time (history) and space (culture), within societies, and through life courses and biographies;
- emphasizing men’s relations, albeit differentially, to *gendered power*;
- spanning both the *material and the discursive* in analysis; and
- interrogating the *intersections of gender with other social divisions* in the construction of men and masculinities (also see Chapter 29 in this volume on ‘Men, diversity at work and diversity management’).

## MEN’S DIVERSE POSITIONINGS ON GENDER EQUALITY

### **Non-gender-conscious and Gender-conscious Positionings**

Much of what men do at work is *not* seen as related to gender equality or even as political or gendered activity at all. It is not seen as ‘about gender’ or about making gender relations more or less (un)equal. Much of men’s practices, in public and in private, in work, negotiations, networking, lobbying, pressurizing and so on is not seen as gendered: they are generally done and perceived as if they were ‘normal’. They are not usually gender-conscious activity: they ‘just happen’! Men’s practices producing and reproducing gender inequality are heavily embedded in social and economic relations – so that men’s dominant or complicit practices may often easily be equated with what is considered and counts as the ‘normal’, usual, or even the official way of doing things. Men’s practices at work are typically constructed as ordinary, mundane (Martin, 2001); women’s are noteworthy – or worse.

There are several ways of understanding these kinds of practices of men. One is through the notion of homosociality (Lipman-Blumen, 1976): men’s preference for men and men’s company, rather than women and women’s company. A particular challenge is to change men’s relations with each other: how is it that heterosexual men are often so homosocial, valuing and choosing men and men’s company? Oddly, such (heterosexual) homosociality can sometimes go hand in hand with heterosexism and homophobia. Another way of understanding is cultural cloning – the tendency to reproduce more of the same – whether by gender, ethnicity or organizational tradition (Essed and Goldberg, 2002). This can be seen and

taken for granted in many organizations and is important in reproducing gender (in)equality.

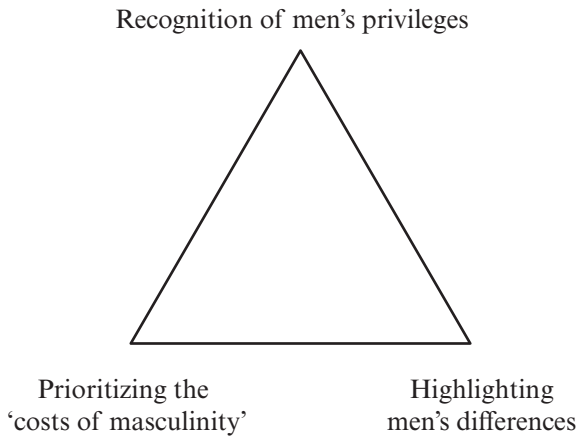
In contrast, there has been a significant growth of men's more explicitly gender-conscious activities; these are often, though by no means always, framed in relation to gender equality. There are many reasons for this, even though men's relation to gender equality and feminism is often problematic. Gender-consciousness does not necessarily mean pro-gender equality. Anti-feminists and male supremacists are gender-conscious in a different way, sometimes alarmingly so, just as white supremacists are race- or ethnicity-conscious. Thus there are many reasons why men are interested in gender equality and feminism. I now outline how we might make sense of these variations.

### **A One-dimensional Continuum of Men's Gender-conscious Positionings**

First, we might recognize some kind of continuum from those men who are actively supportive of gender equality to those who are in favour of this, in theory, but do not do anything in particular to those who are 'not bothered', to those who are actively hostile. Men's relation to feminism varies along some kind of continuum from outright anti-feminist hostility to muted hostility to vague interest to profeminism and support for gender equality. In-between forms of men's politics may see 'gender equality' agendas as opportunities to benefit men, without much concern for women. This fits results of Scandinavian surveys that found about a third of men as 'traditional' and hostile to gender equality, a third in favour and in some way active in their lives, and a third 'in principle' passive and unaffected (Jalmert, 1984; Holter, 1989; Holter and Aarseth, 1993). A single continuum can, however, mask other dimensions. Specifically, men may: on the one hand, be pro- or anti-gender equality in terms of the dimension of *gains for women*, but, on the other, may also be pro- and anti-gender equality in terms of the dimension of *gains for men*. Some men seem more interested in gaining more for themselves than a more general move to societal gender equality.

### **A Two-dimensional Triangle of Men's Gender-conscious Positionings**

A second way of approaching men's relation to gender equality and feminism addresses more than one dimension of difference among men's positionings. The array of political positions adopted by men's gender-conscious organizing in the US context has been analysed by Michael Messner (1997), within three points of a triangle. The apexes of the triangle are: first, the recognition of and opposition to men's institutionalized



*Figure 30.1 The triangle*

privileges; second, the recognition of the 'costs of masculinity'; and third, the recognition of differences/inequalities among men, by sexuality, racialization, religion and so on (Figure 30.1).<sup>1</sup>

This produces a less either–or analysis, less of a continuum. It points to the complexity, and the contradictions and ambiguities of positionings, especially questions of differences/inequalities, and the different kinds of differences, inequalities and 'in-between' positions among men. Thus one cannot reduce gender politics to a simple 'left–right' dimension. It opens up some political spaces, but this is not enough.

This kind of more open framework can also be useful in charting both social movement changes and developments in men's relation to gender equality over time. Since the 1970s there have been several identifiable and shifting forms of explicitly gender-conscious politics by men, not only from anti-feminist to profeminist/anti-sexist. In several countries anti-sexist men's movements in the 1970s and early 1980s, influenced by feminist, gay, left, anarchist, welfare and green politics, were active in national and regional conferences, gatherings, groups and campaigns. By the mid-1980s there was a loss of momentum in some anti-sexist men's movements; many men either left these activities or tried to bring these issues into more mainstream and professional work, such as equality work, teaching, youthwork, media, therapy, consultancy, writing and research. This can be seen as both putting ideas into effect and facilitating their dilution and incorporation. In the 1990s, men's rightist organizations grew – some confusingly called the 'men's movement', as opposed to anti-sexist or mythopoetic ones.

There is also a gradual growth of composite groups of men, such as ‘older profeminist men’ or ‘black gay men’. There has been something of a recent revival of interest in profeminism internationally. Examples of profeminist activity include the European Profeminist Network ([www.europrofem.org](http://www.europrofem.org)); the EU Critical Research on Men in Europe ([www.cromenet.org](http://www.cromenet.org)), and the International Network for the Radical Critique of Masculinities. Even so, the dominant gender-conscious social movements among men remain complicit with or reinforcing of patriarchal social relations.

Having outlined two ways of conceptualizing men’s gender-conscious positionings, I now turn to those positionings with a positive, broadly (pro)feminist relation to feminism – to the top apex of the triangle.

### **A Three-dimensional Elaboration of Men’s Positive Relation to Gender Equality and Feminism**

The continuum and the triangle provide two ways of locating men who say they want to be involved or are interested in gender, ‘gender equality’ and feminism. However, these two approaches may not engage sufficiently with differences in what is *actually meant* by gender equality and feminism. There is in effect a third dimension of difference to be elucidated at the top apex. Gender equality and feminism can themselves be understood in various, quite different ways – as (liberal) reform, (standpoint) resistance, and (deconstructive) rebellion positions. This elaboration gives a three-dimensional picture of men’s various, very different relation to gender equality and feminism.

In liberal reform feminism, gender equality is a matter of realizing the potential of women and men equally, albeit within the context of current gender order and social structures. To quote Judith Lorber (2005b, p. 13):

Gender reform feminists locate the source of gender inequality in women’s and men’s status in the social order, arguing that it is structural and not the outcome of personal attributes, individual choices, or unequal interpersonal relationships. . . . An overall strategy for political action to reform the unequal gendered social structure is *gender balance*. (Emphasis in original)

This can be seen as the dominant position in governmental, non-governmental organization and some corporate gender equality politics; the implication is that men can contribute positively to (or can position themselves against) such a programme of change towards the *abolition of gender imbalance*.

Lorber continues: ‘Gender resistance feminists argue that the gender order cannot be made equal through gender balance because men’s



dominance is too strong' (p. 14). Gender equality *per se* is not a feasible aim; it may end up with women becoming like men. A more radical transformation is necessary, with women's voices and perspectives reshaping the gendered social order in a more fundamental way, including the *abolition of patriarchy*. Men's positionings are less certain; the implication is that men need to position themselves, for or against, or in more ambiguous middle ground, in relation to the more radical project of abolishing patriarchy and patriarchal relations.

Gender rebellion feminists go further still, seeking to 'take apart the gendered social order by multiplying genders or doing away with them entirely'. (p. 12). Connections with other social divisions, differences and oppressions become central, as do deconstructions of categories of sex, sexuality and gender, and the dualities often (re)produced through them (see Lorber, 1994, 2000, 2005a). Men, or rather 'men', become an outdated social category (Hearn, 1998, 2004), even a potential site of stigma. This may appear to be the most radical conceptualization of gender (in)equality. The implications for men are less clear still. They may range from dismissal as irrelevant to immense uncertainty and humility to even a certain kind of social paralysis, or to an awakening of renewed optimism of a 'queer' future where gender is degendered, with the *abolition* of men.

Further complications and contradictions are observable when one considers in more detail the practices of men identifying as feminist or profeminist (Hearn and Holmgren, 2006), whether at work or in political life more generally.

Men's positive relation and positioning to and within gender equality and feminism are thus more complex and multifaceted than the two first approaches might suggest.

## GENDER EQUALITY AND GENDER EQUALITY POLICY IN WORKPLACES

Women have been the driving force in the development of gender equality policies. Policy debate on gender equality has developed primarily in terms of what women have to gain from greater gender equality. This has become the 'mainstream' of gender equality work. At the same time, men are also involved and implicated in gender equality policies and practices – in many ways: for example, as spouses, fathers, and other family members; colleagues and trade union members at work; managers and employers; policy makers; active citizens in social organizations; and so on. Sometimes, as noted above, this has meant some men resisting moves to gender equality or seeing it only as 'women's business'. We can ask:

- What part can men play in gender equality?
- What gender equality policies need to be developed for men?
- How can men contribute positively to gender equality?
- How do such questions look for men of different ages, ethnicities, classes?

Intersections of men, gender relations and other forms of social division and inequality, such as ethnicity, remain an important and undeveloped field in policy development. There are many important interrelations between the various aspects of men's positions and experiences, and their impacts on women, children and other men, and strong interconnections between different policy areas. Men dominate key institutions, such as politics, management, trade unions, churches and sport; yet some men suffer marginalization as in higher rates of suicide, some illnesses and alcoholism than women. Such interrelations present key questions in policy development.

Men and masculinities are set within changing policy contexts. There have been huge historical changes in masculinity and men's practices; yet there is also stubborn persistence in some aspects of them. The most obvious of these is men's domination at the top of organizations, including business and government, along with men's domination of the use of violence. Changing gender relations both constitute workplaces, governments and other policy-making institutions, and provide tasks for business, governmental, partnership and third sector agencies to deal with. Workplaces are part of both the problem and the solution to gender equality. Organizational work, and work-home 'reconciliation', can be sites of gender change for men (Holter, 2007).

To understand local, national and transnational policy contexts, it is necessary to analyse and change the place of men within the gender structure of business, governmental, transgovernmental and other policy-making organizations. This includes the relative lack of attention to men in power, the implications of mainstreaming for men, and men's relation to gender equality at work. In most contemporary business and other workplace organizations, managerial prerogative over key decisions remains the taken-for-granted norm, generally unquestioned and unchallenged. This applies, though perhaps more subtly, in teamwork, collaborative organizing, project organization, and various forms of organizational and management restructuring and delayering. While management is often, indeed usually, presented as if it is a gender-neutral activity, it remains strongly dominated by men in most organizations (Collinson and Hearn, 1996). Assumptions of gender-neutrality in and of management have been strongly challenged by feminist and feminist-influenced studies, showing

how management often excludes women, and especially black and minority ethnic women.

Changing men's relation to management involves the support of women and women's initiatives in management. If the current gendered form of management is to change, and if there are to be more women in management, there will be fewer men there. Getting the question of fewer men in management and boards onto workplace policy agendas, or at least onto the table for discussion, seems to be difficult. Targets, both nationally and individually, can be set for changes of this sort. This can include discussion of what constitutes a minimum acceptable mass of women in management, and a maximum acceptable mass of men in management. There is clear progress in the reduction in men's domination of company boards in Norway (Huse and Solberg, 2006). The issue is now also being debated in Sweden and Finland.

Regendering workplaces and management involves developing the range of flexible working, family-friendly and care leave policies. Clearly the baseline daycare and similar support that exists through the state varies greatly between countries. Some companies are now providing considerable direct support to women and men managers for what are usually domestic labour, not only for childcare but also for cooking, cleaning, washing and so on. This is a way of transferring domestic labour from the personal responsibility in the family to (usually) other women not in the family – a modernized, gendered form of corporate domestic service. While broad provisions of 'family-friendly' and related policies on caring for dependants is to be welcomed, there are potential problems in managers and employers taking too active a stance in the organization and management of the 'family' lives of *individual* staff and managers. Without sympathetic implementation this can become an extension of managerial, often patriarchal, surveillance into employees' private, domestic and sexual lives.

This links with the question of time-use. While overall employed working time has decreased since the end of the last century, in some managerial jobs and sectors, the (gendered) phenomenon of presentism is a serious problem, and difficult to resist for men whose jobs remain insecure. Rutherford (1999) reported high levels of working time spent by managers, especially senior managers, in her studies of the UK financial and airline sectors (9.9 hours per day plus most taking work home, with 11.4 hours in one division of the finance sector case study organization). Interactions of time-use and organizational position is a vital area of ambivalence for at least some men business managers. There are urgent needs for employers to facilitate ways and means for men to reconcile work and domestic/family/personal life more positively. This includes

attention to more job-sharing, voluntary reduced work time, flexible working hours, term-time working, working from home, and similar initiatives. Men can indeed be 'reluctant managers' (Goffee and Scase, 1989).

Working along somewhat similar lines, Cooper and Lewis (1998; Cooper, 2000) outlined key steps for their broad 'agenda of change', as follows: 'integrating work-family issues into core thinking and strategic planning in organizations'; 'more diversity in decision-making'; 'a rethinking of notions of time'; 'developing flexibility and autonomy'; 'redefining careers'; 'new approaches to management'; 'redefining success'; and 'public support and partnership with industry'. While these steps are by no means unproblematic, they do point to the growing understanding of the complex intersections of forms of home life, employment, organizational structure and process, management and gender relations. These interconnections have complex and equally important implications for men as for women. Norwegian research suggests that men's paternity leave is significantly lower for senior managers, men in private sector organizations, and men with high overtime use (Brandth and Kvande, 2003). Greater participation in such leave and childcare may lead some men to take more leave in the future, and may be part of more egalitarian relationships with partners. Haas and Hwang (1995) have found evidence in their Swedish research that parental leave encourages more 'androgynous' behaviour and blurring of what have been thought of as 'gender roles'.

In some work organizations there is some degree of regular change in management positions. In others, managerial positions are more permanent, and it may be very unlikely that many men will wish to move from management. If that is so, it can be considered how they might move 'temporarily', for example, by exchanges with women, shifts to specialized or lower positions on the same pay, external secondments, sabbaticals, and so on, as ways of opening up management positions for women. Furthermore, changes that are already happening in business organizations, such as budgetary, legal, geographical and restructuring changes, can be seen as opportunities for challenging and changing men there in management and elsewhere.

Men in workplaces, organizations and management need to be understood in gendered terms. Organizational power, structure and decision making can all be reinterpreted in this context (Hearn, 1989; Collinson and Hearn, 2005). Where appropriate, men can be challenged in terms of dominant forms of masculinity. Men managers, and indeed workers, need to look critically at themselves not only as workers or managers, but also through gendered eyes. This raises the question of how for many men

in such a position, different forms of management and different ways of being men can be simultaneously reproduced – authoritarian, paternalist, careerist, personalist, entrepreneurial and so on (Collinson and Hearn, 1994). In some organizations, ‘conventional’ managerial masculinity is simply unreasonable behaviour. There is also the question of whether it is possible to develop profeminist management (Hearn, 1994, 2000). Men cannot be absolved from the responsibility for equal opportunities policies and the development and promotion of women staff (Cockburn, 1991). Different men’s (by age, class, disability, ethnicity, race, sexuality) relationship to equal opportunities policies needs to be more explicit. This involves examining the interaction of gender and other social divisions; of considering the different situation of different groups of men, for example, black men, men with disabilities; and making explicit the category of white heterosexual able-bodied men (WHAMs) (Hearn and Collinson, 1994).

Men’s cultures in many workplaces need to be open to explicit examination, discussion, critique and change. Certain men’s cultures produce a climate of sentiment both antagonistic to women and harmful to men (Cockburn, 1991). Men’s competitive behaviour, especially in mixed groups, needs to be the subject of critique and change (Case, 1994). Common pitfalls for men in such situations include: ‘hogging the show’; being the continual problem solver; speaking in ‘capital letters’; defensiveness; put-downs and one-upmanship; negativism; transfer of the focus of discussion; intransigence and dogmatism; listening only to oneself; avoiding feelings; condescension and paternalism; using sexuality to manipulate women; seeking attention and support from women while competing with men; storing key group information for one’s own use; and speaking for others. Instead, attempts have been made to specify what responsible action might look like: limiting our talking time to our fair share; not interrupting people who are speaking; becoming a good listener; getting and giving support; not giving answers and solutions; relaxing; not speaking on every subject; not putting others down; nurturing the democratic group process; and interrupting others’ oppressive behaviour (Moyer and Tuttle, 1983). Such possible changes have clear implications for women.

Explicit attention needs to be given to such issues in in-house training in workplaces. For men, training might address such issues as: male identity; how men’s prejudices were encouraged; the good and bad things about being a man; how men’s attitudes and behaviours can change; how the organization reproduces dominant ‘male’ values; and ways of changing the organization in these respects. Women in organizations should have at least as much time and resources as do men for training and related

activities. Training budgets could be distributed to women/men in *inverse* proportion to the number of women/men in management or elsewhere in the organization.

Organizational and managerial policies and practices need to be developed not just around 'gender in general' but around sexuality, sexual harassment, heterosexism, and indeed violence and violation. Many business organizational cultures remain dominated by heterosexuality and conventional forms of heterosexuality, with the consequent devaluing or worse of lesbian, gay, bisexual and queer sexualities. This can occur in both everyday organizational cultures and more formal policies.

More generally, men in workplaces can be asked to clarify where they stand in terms of, for example, anti-racism, anti-sexism, profeminism, gay and queer affirmation. This may involve acknowledging ambivalence and dilemmas rather than pretending that there is some 'pure' position. It necessitates avoiding the idea of some men being 'more advanced' or 'further on' than other men. Men can be asked what they are doing and how long term any commitment is. It is important to see nothing as 'too trivial', while, at the same time, recognizing the possibility of changing the whole 'set' of the organization, whether mainstream or not. The particular and the global often go hand in hand.

## RESISTANCE, RESPONSIBILITIES, REACHING OUT . . .

Finally, it is important to address the *resistance* of many men to different forms of involvement in gender equality debates, policies and activities; the *responsibilities* of men in taking part in the promotion of gender equality; and the process of *reaching out* to other men who are less interested and less involved in gender equality. Resistance to involvement comes from men for a wide variety of reasons: patriarchal practices, sexism, maintenance of power, complicity in current arrangements, definition of gender equality as 'women's business' and not the 'main or most important issues', preference for men and men's company. Responsibilities of men for involvement in gender equality range across the full range of social and economic arenas and issues: work, family and home, sexuality, violence, education, health, sport, organizations and management. Reaching out concerns how to make contact with men, individually and collectively, who may be uninterested in or even actively hostile to, these issues and arenas. This involves raising and taking what may appear to be unusual questions into men's arenas – trade unions, management, workgroups and so on.

## NOTE

1. These three positions in some ways correspond to the stress on 'responsibilities', 'resistances' and 'reaching out', respectively (Hearn, 2001).

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## 31. ‘Talking sports’: sports and the construction of hegemonic masculinities at work

**Michele Rene Gregory\***

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### INTRODUCTION

What role do sports play in the formation of American white-collar organizational cultures and to what extent do they produce inequality? Using the concept of ‘talking sports’, this chapter illustrates the importance of sports in the construction of exclusion and inclusion based on gender and race at work, and, in so doing addresses the function of spatial relations. ‘Talking sports’ refers to displays of sports knowledge about teams, players, games and matches and the use of sport metaphors. The primacy of sports in the construction of masculinity in Western countries has been documented (Messner, 1992; Connell, 2005), as has the importance of professional men’s sports (Knoppers and Anthonissen, 2005). As white men dominate the most esteemed organizational positions in countries such as Australia, the United Kingdom and the United States (Wajcman, 1998; Hearn and Parkin, 2001; Connell and Wood, 2005; Johnson, 2005), examining the relationship between athletic games and the embodiment of masculinities at work and marginalized groups is vital.

‘Talking sports’ is one of three components – the other two being ‘playing sports’ (the role of participating in sports such as golf as part of work) and ‘sports strategies’ (the use of athletic tactics, such as ‘slam dunk’ in the workplace) – which are part of a theoretical model that I have developed on sports relations at work. The need for this research developed after a review of international feminist, masculinities and management literature was found to address only marginally the relationship between sports and hegemony at work. For example, research in Norway illustrates that the most desirable leadership skills are associated with ‘high-performance sport’, which benefits more male than female job candidates (Hovden, 2000: 80). Additionally, data in Britain indicate a relationship between sports and managerial masculinities (Özbilgin and

Woodward, 2004). However, previous studies do not specifically analyze how ‘knowing sports’ constructs the production of knowledge in organizations, that is, what is valued. Despite the importance in the US of institutionalized sports, such as football, basketball and baseball, little empirical research focuses on the relationship between the role of competitive sports and the masculine embodiment of professional and executive work in organizations.

The chapter first illustrates how sports constitute a form of cultural and social capital (Bourdieu, 1986) used to distinguish groups of people based on gender, race, class and so on. This section also reviews literature on gender, race and organizations and management to contextualize, in particular, the position of women and African Americans in the labor market in the US. The following section shows how ‘talking sports’ is used in organizations to construct the dominant culture and the production or work process.

Although this chapter is part of a long-term study, the data used here to develop the theoretical model which incorporates ‘talking sports’ draw upon my years as a former collegiate basketball player and as an employee in the financial services industry in the US. In the latter arena, I witnessed the fundamental role that sports play in the construction of managerial masculinities and organizational cultures, and I contend that the most useful tool in navigating my career in corporate America was my experience as a competitive athlete.

## HEGEMONIC MASCULINITY AT PLAY

How do sports construct gender and racial hegemony at work? The literature on sports and domination show that institutionalized athletic competitions are rooted in gender, racial, class and sexual dominance. Although research indicates a connection between sports and the construction of masculinities and leadership at work, it does not consider the role of ‘talking sports’.

### **Sports and the Embodiment of Hegemonic Masculinity**

The nexus between sports and masculinity largely remains unproblematic and unchallenged in media representations of athletes whether in television, print or advertisements. Conversely, the literature critically analyzing the gendering of sports illustrate that sports are a key factor in the construction and embodiment of masculinity (Kimmel, 1987; Connell, 1990; Messner, 1995) and in linking masculinity with aggressive

behavior and male supremacy. In his analysis of hegemonic masculinity in American culture, Trujillo argues that: 'masculinity is hegemonic when power is defined in terms of physical force and control. . . . In this way, the male body comes to represent power, and power itself is masculinized as physical strength, force, speed, control, toughness, and domination' (1991: 291).

Therefore, the muscular male body becomes both a symbol of athletic prowess and a weapon, which is 'proof' that men are physically superior to women (Messner and Sabo, 1994; Buysse and Embser-Herbert, 2004; Connell, 2005). Even though most men are not professional athletes, many identify with the dominating images of male sports heroes reflected in the media (Messner, 1992). This dominant form of masculinity also encompasses male heterosexuality and homophobia (Kimmel, 1994; Messner and Sabo, 1994; Connell, 2005).

### **Black Athletes and the Cultural Reproduction of Race and Ethnicity**

In the US, African-American men have come to dominate the ranks of two of the most popular professional sports, the National Football League (NFL) – 65 percent – and the National Basketball Association (NBA) – 77 percent (Lelinwalla, 2004). However, institutional sports have not provided equal opportunities in all areas for black men (or black women). Within particular sports, racial differences and disparities prevail which have contributed to the framing of black athletes of both genders as 'naturally' good players, more physical and emotional and better at taking directions than white athletes who are viewed as more cerebral, more hard working and more suited to leadership (Acosta, 1993; Davis and Harris, 1998; Knoppers and Anthonissen, 2005). Vertical racial segregation also exists – in the NFL, 9 percent of head coaches are black, and there are no black team owners, while in the NBA, the percentages are 30 and 3 percent, respectively – and black head coaches have shorter tenures than their white counterparts (Arnold, 2003; Leonhardt and Fessenden, 2005). Ten years after the inception of the Women's National Basketball Association (WNBA), 63 percent of the players are black; however, only 15 percent of head coaches are ethnic minorities, down from 32 percent in 2004 (Associated Press, 2006), 69 percent of head coaches are male, up from 12 percent since 1997 (Gregory, 2007), and there is one female African-American owner.

These figures bring gender back into the discourse of inequality in sports. In addition, media commentaries and representations of black female athletes often illustrate how problematic their gender and race status can be. Accounts of Venus and Serena Williams's experiences of

racism (Jacques, 2003, 2005) and radio host Don Imus's reference on April 4, 2007 to the mainly black Rutgers University women's basketball team as 'nappy-headed hos' are telling. Recent theoretical arguments by sports sociologists stress that the relationship between social space and sexism, racism and homophobia in sports needs to be addressed (van Ingen, 2003).

### **Marginalized Performances at Work**

In their article on sports and managerial masculinities, Knoppers and Anthonissen 'argue that there is little research connecting management and professional/media sport, two areas where masculinities are created and reproduced' (2005: 123). This is despite suggestions that characteristics such as strength, domination, power and aggression are extremely important to how male professional athletes, coaches and business executives 'do gender' (West and Zimmerman, 1991; Kilduff and Mehra, 1996; Coakley, 2004). Furthermore, researchers report that competitive contact sports have been instrumental in the construction of men's power and domination over other men and women in organizations, especially in management positions (Collinson and Hearn, 1996; Coakley, 2004; Connell, 2005).

Available data indicate that in the US, men comprise 47 percent of professionals working in private and public organizations, yet they comprise 66 percent of officials, managers and supervisors at all levels (EEOC, 2005). Ethnic minorities comprise 20 percent of officials, managers and supervisors at all levels, and ethnic minority men are one and a half times as likely to be in these positions as ethnic minority women (*ibid.*). In private sector Fortune 500 corporations, men comprise 94 percent of corporate officers with line jobs (The Glass Ceiling Foundation, 2003) and 88 percent of board directors (Solis and Marta, 2003). African Americans hold less than 1 percent of corporate executive positions in Fortune 1000 corporations (Johnson, 2005). The data thus confirm that gender and race are at play in the workplace.

Research on gender and white-collar organizational cultures in developed countries encompasses a range of perspectives, including competitive masculine cultures (Pierce, 1996; McDowell, 1997; Wajcman, 1998) and gender and domination in organizations (Harlow et al., 1995; Morgan and Martin, 2006). In addition, studies on gender and management (Schein and Davidson, 1993; Wajcman, 1998; Bell and Nkomo, 2001) and masculinities and management (Collinson and Hearn, 1994, 1996) show the various ways in which women are blocked from climbing the corporate ladder.

However, the literature largely omits an in-depth analysis of the relationship between sports, gender and the construction of workplace masculinities, despite suggestions that the use of sports is ubiquitous in organizations. Persaud et al. (1990) find that male managers are twice as likely to watch and engage in sports and discuss current events with male subordinates as with female subordinates. Other studies indicate a relationship between playing sports, displaying sports knowledge and using sport metaphors and male bonding, recruitment and promotions at work, which sometimes adversely affects women (Parker, 1996; Martin, 2001; Özbilgin and Woodward, 2004; Morgan and Martin, 2006). Although these studies do not focus specifically on sports, they do suggest a relationship between sports and 'preferred and legitimate' gendered performances and work.

Data on race and ethnicity in highly skilled professional organizations have illustrated that men of color often negotiate power from a position of real or perceived weakness (Cheng, 1996; Ely, 1996), that they do not represent the ideal executive (Cheng, 1996) and that both black women and black men are underrepresented in management jobs (Cohen and Huffman, 2007). Researchers have also examined the professional lives and issues affecting minority executives and the differences between them and their white colleagues in predominantly white corporations (Wells, 1998; Thomas and Gabarro, 1999; Bell and Nkomo, 2001).

In *Breaking Through: The Making of Minority Executives in Corporate America*, David Thomas and John Gabarro use the 'tournament metaphor' initially developed by James Rosenbaum (1979), whereby employees who perform well receive promotions early on in their career; that is, they are not eliminated and consequently move to the next round of challenges (Thomas and Gabarro, 1999: 63). Although the authors find that blacks and whites play in two separate tournaments, with blacks progressing at a slower rate than whites, they do not analyze how the use of sports actually constructs organizational cultures and hegemonic masculinity.

Although the literature illustrates that gender and race are factors in the construction of ideal or preferred professionals and executives and masculine environments at work, very little research has been carried out which specifically examines the role of sports. Analyses and arguments have also tended to focus on either gender or race, but generally not the two together.

In the next section, I develop the concept of 'talking sports' to clarify how sports are a factor in the construction of gender and race in financial services organizations. Using a gendered and racial narrative, I argue that 'talking sports' can be analyzed in terms of spatial relations, that is, 'social beings occupying certain life-spaces' (Jackson, 1999: 38) and spatial

divisions incorporating social-power relations (Massey, 1998). This last concept is useful in researching how sports are used in social encounters at work to construct 'degrees of exclusivity and openness' (Madanipour, 2003: 5). The examination of 'talking sports' at work is derived from my observations and 10 years of experience as a sales and marketing professional in three Fortune 100 financial services corporations in the US.

## 'TALKING SPORTS'

If sports have been a factor in the construction of hegemonic masculinity, how much is 'talking sports' at work a factor in shaping organizational cultures and does this result in gender and racial disparities? 'Talking sports' consists of displaying sports knowledge about teams, coaches, athletes, tournaments, playoffs, games and matches and using sporting metaphors. In addition, 'talking sports' creates camaraderie, bonding and networking and is consequently a factor in how employers determine employment suitability and even loyalty. My background as a former athlete allows me to provide unusual insights into how women employees who have sports knowledge fare in male-dominated organizations. A Division I collegiate basketball player, I was the only person – male or female – in any of my work environments to have played competitive sports at that level. The work context from which my observations are drawn reflects an environment where employees range from highly skilled professionals to senior-level executives, and the overwhelming majority are middle- and upper-class and white, and at the most senior levels, overwhelmingly male. In two sales and marketing departments, I was the only person of color (African American) and in one, also the only woman.

### **The Business of Sports**

During my business career I witnessed and engaged in endless amounts of 'talking sports' largely with male colleagues and male superiors. The relationship between sports talk at work and gender exclusion is largely dependent upon which male managers and executives consider sports talk 'male territory' and part of the construction of the 'ideal' employee. Male territory encompasses not just abstract knowledge, but also physical locations, such as executive floors, toilets and dining facilities, and in these spaces 'talking sports' may be a constant feature of the environment and thus of inclusion or exclusion.

I was once invited to dine with a senior-level executive who reported to the president of the corporation. Our meeting took place in an elegant

private dining room reserved mainly for the use of the organization's corporate elite – 25 white men, one black man and one white woman. During our discussion, the executive commented on his autographed photograph of a baseball legend which hung prominently near the entrance of his office suite. The executive informed me that his photograph was the topic of many conversations that the mostly male executives of this corporation had with one another. Sports memorabilia can be emblematic of status, prestige, achievement and domination. For example, on September 15, 2007, the hip-hop fashion mogul Marc Ecko bought Barry Bonds's record-breaking 756th home-run ball for \$752,467 – and then donated it to the Baseball Hall of Fame. Purchasing or displaying sports paraphernalia confers worth and legitimacy. If men in executive positions feel that these sports artefacts are as significant as work itself and are emblematic of their personal values, women and non-compliant men who do not share these values may find themselves excluded from key social groups at work.

Massey argues that 'symbolic meaning of spaces/places and the clearly gendered messages which they transmit . . . both reflect and affect the ways in which gender is constructed and understood' (1998: 179). Here Massey refers to women's limited mobility in the workplace which in some contexts helps to construct their subordination. However, her analysis is useful in understanding that when 'talking sports' is largely confined to male social interactions in male-dominated organizations, a form of 'spatial separation' occurs through the legitimizing of certain forms of knowledge by certain people (p. 179). 'Talking sports' represents masculinity and therefore can be examined through what Lefebvre calls 'representations of space', verbal symbols which 'dominate space in any society (or mode of production)' (2003: 38–9).

Massey and Lefebvre's work on spatial relations acknowledges the role of social power. Yet it is also necessary to consider what happens to members of a marginal group when they acquire some form of social capital. If sports knowledge is used by men as part of the work process, are women who have (or are perceived to have) sports knowledge just as acceptable as men? In what instances is sports knowledge more important than gender and race?

### **One of the Boys**

One evening in 1996 a sales executive from one of the largest global financial corporations telephoned me to inquire about my interest in a senior-level sales position. The executive explained that after reviewing my résumé what most intrigued him about me was my reference to having played Division I collegiate basketball – even though he had never played



sports for a college team. During a friendly 20-minute conversation, we spoke about the job requirements, but also about notable male collegiate and professional basketball players. Asked why my former experience as an athlete made him call, the executive replied that since I had played competitive basketball at what was then the highest level for women in the US, I understood competition and what it meant to work hard and long hours in the field. Although I declined to pursue this opportunity, the executive informed me that should I change my mind he would be happy to meet with me.

This example illustrates how important it is for women and men to be associated with sports in the corporate arena because ‘talking sports’ is considered essential in the production of work knowledge and consequently part of the organizational ethos and work process. Making my athletic career apparent on my résumé legitimized and gave me instant access to a valued job, not as a woman, but as a ‘sportswoman’. My being considered as a contender for a prestigious position was the result of not only ‘talking sports’ but also having played competitive sports, and therefore I embodied an ideal form of masculinity. The executive who judged my suitability and ‘qualifications’ as an athlete had no such experience himself. He needed only to talk sports to occupy hegemonic space. This double standard may suggest that for women to be considered as knowledgeable as men about sports, they need higher ‘qualifications’. Women workers who are conversant with and have played competitive sports may find that this diminishes some aspects of ‘female liability’ and that they become in some capacity ‘one of the boys’.

Like gender, race too is a factor in the construction of work cultures and interactions. Existing studies indicate that sometimes black men are more likely than women to be included in social events and networking with white men (Cockburn, 1991), while others argue that in sports environments male bonding is usually segregated by race and class (Messner, 1992). Because black men in the US are often stereotyped in the media as athletes or criminals, and their numbers in highly skilled professions and executive positions are low, it is crucial to understand how ‘talking sports’ and race intersect at work.

### **Parodying Black Male Athletes**

‘Talking sports’ is not exclusively about which athletes score how many points, what their salaries are and who is traded, but is sometimes also about racial and cultural differences. An example of race and sports intersecting at work is the mimicking of black athletes to mock black culture. In my former corporate environments, I witnessed white male colleagues

incorporating 'black' language, such as 'you da man', in their social interactions and in emails and memoranda. (The phrase signifies that one has succeeded or scored.) I also observed how colleagues would imitate – often with a smirk – what Majors (1990) calls 'cool pose' in the form of 'high fives', hand shakes, 'pimping' (that is, a laid-back loping gait) and the touchdown dances sometimes enacted by black football players. Majors defines 'cool pose' as a set of behaviors enacted by black men, especially public figures – athletes and entertainers – in response to structural limitations fueled by racism: 'black men often cope with their frustration, embitterment, alienation, and social impotence by channelling their creative energies into the construction of unique, expressive, and conspicuous styles of demeanour, speech, gesture, clothing, hairstyle, walk, stance, and handshake . . . described as cool pose' (p. 111).

Majors argues that black men who perform 'cool pose' feel that they are in an enviable position and that their behavior is not available to white men (or, it would appear, to black women). Although some of my white male colleagues considered their behavior to be a way of embracing black athleticism and black culture, many performed their acts as a form of 'black face', lampooning the 'cool pose' behavior that some black male athletes display. These caricatures are sometimes a response to the perception of black male athletes 'as a threat to white hegemonic masculinity' (Ungar, 2007: 26). Such conduct is an example of how 'race is done at work', and is instrumental in the construction of workplace cultures dominated by white men.

In his analysis of racial and ethnic boundaries and spatial segregation in the workplace, Steven Vallas asks, 'Precisely how do workers "do" race on the job?' (2003: 380). Although Vallas underscores the importance of homosociability in relation to gaining access to valued resources at work, the study is limited in detailing precisely how language and behavior in informal workplace interactions produce racial differences. In my workplace observations, white male, and perhaps even white female, employees use 'black' language and behavior, a form of racialized space, to create a hierarchical environment for themselves and in the process marginalize black athletes and black people generally. The dominant culture's use of stereotypical aspects of 'black' behavior can be considered 'representations of space' (the use of language to establish meaning) and 'representational spaces' (the use of 'non-verbal symbols') (Lefebvre, 2003: 39). Both these frameworks allow the hegemonic construction of whiteness to be produced and reproduced at work.

That there were no other black people in the sales and marketing divisions where I worked gave me an opportunity to observe how even when African Americans are largely absent, their 'otherness' is still quite visible,

yet marginalized as one-dimensional characters. At times, race (and ethnicity) are more significant than gender: I observed that while many of my white male colleagues who used 'cool pose' with each other and attempted to do so with me, they did not engage in this behavior with white women. Therefore, black women who embody a competitive athleticism become 'da girl' – a form both of essentialism and of acceptance.

## CONCLUSION

'Talking sports' is important in the construction of professional and managerial masculinities in business organizations. I have analyzed this concept by reflecting upon and examining how business professionals use 'talking sports' as part of the production process (business negotiations and meetings with colleagues, as well as subcontractors or clients), especially in organizations dominated by white, middle- and upper-class men.

The observations detailed in this chapter can be used to address a range of future research questions on the intersectionalities of gender, race, class, sexuality, age and disability which will inevitably help to expand and develop a theory on sports relations at work using the three concepts I have formulated: 'talking sports', 'playing sports' and 'sports strategies'. For example, how are these three concepts in organizations problematic (or not) for groups such as women, gay men, older individuals, the overweight, the disabled and non-compliant men who may be perceived as lacking athletic ability, knowledge or interest? Additionally, future studies should ascertain if females, gays, disabled, older and overweight business professionals identify with sports and whether this destabilizes assumptions of embodied heterosexual able-bodied male superiority.

Sports and the production of race and ethnicity at work are important, and despite what is often considered to be the success of African-American male athletes, their achievements are not replicated collectively in elite areas of organizations. Analyzing the social construction of sports and executive work may be more complex when looking at the lives of black and other ethnic minority men and women in organizations.

Because sports carry national and international cultural significance, this study and the questions it has raised will have implications for future research on the relationship between work, management and competitive athletics in local and global organizations. Subsequent accounts of sports and work may suggest that they have a great deal of importance on the experiences of a wide range of professionals.

## NOTE

- \* The author extends her thanks to Camilla Funck Ellehave for initially reviewing a much longer version of this chapter and providing valuable comments.

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