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**Promoting gender balance and inclusion in research,  
innovation and training**

**PLOTINA**  
**GA nr. 666008**

## **PLOTINA Working Lexicon**

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## Objectives and process followed

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One of the deliverables of this project was to agree definitions on Gender Equality, Work-Personal Life Integration and Culture to ensure that all partners have a similar ‘working’ language with a common understanding of the concepts within the PLOTINA project. The following lexicon includes concepts that are important to be defined for the purposes of this project. It is not intended to be a comprehensive dictionary for experts but a working language for PLOTINA and its consequent impact into the active STEMM and non-STEMM academic communities.

**A number of different definitions were collected for each concept and presented at the kick off meeting of the project.** Partners and Advisory Board (AB) Members discussed the tabled definitions informally during the kick-off meeting. A revised draft document was circulated to the partners and the AB members present at the meeting for further comment. They were asked to indicate their preferences among the presented definitions and comment on whether these definitions were sufficiently clear, functional and useful for the aims of PLOTINA. It was emphasised that some of the concepts are complex and pragmatic working definitions were needed to deliver the tasks of PLOTINA. They were also invited to add/edit/delete any definitions if they believed it would benefit the project. The processes followed are summarised in figure 1.

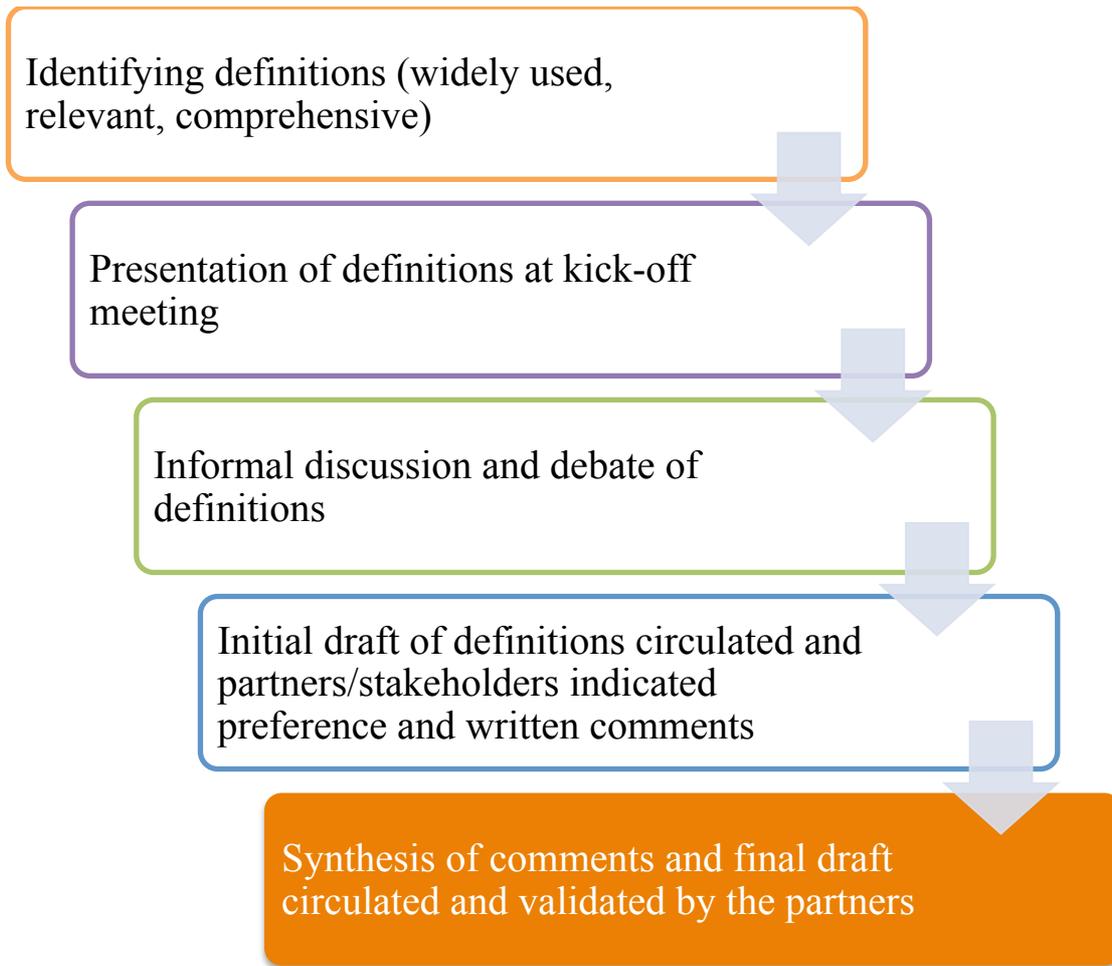


Figure 1 Process followed for establishing the initial Lexicon

The Consortium is aware that the definitions adopted are not perfect for every situation. The ones chosen have been selected on the basis of their wide use across different communities, their relevance to the project, and with the requirement that they will support the development of Gender Equality Plans in the cross-national variations that will underline the work packages. At times ease of use by a non-expert may determine the definition used, remembering that the goal of PLOTINA is to support the effective participation of women (as defined by common usage) in research performing organisations. It is anticipated that the **definitions will be dynamic and may need to be changed as PLOTINA evolves based on our experience and our reflections in operationalizing these concepts within this project**. Last but not least, we expect that this Lexicon will be further enriched by more concepts that will need to be clarified as the project proceeds.

## Gender Equality

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### PLOTINA DEFINITION

**Gender equality** is the result of the absence of discrimination on the basis of a person's gender in opportunities and the allocation of resources or benefits or in access to services.”

(EC, Strategy for equality between women and men 2010-2015, amended see notes)

### OTHER DEFINITIONS

1. “The enjoyment of equal rights, opportunities and treatment [...] in all spheres of life. It does not mean, however, that men and women are the same or must become the same”, rather that they should be “free to develop their personal abilities and make life choices without the limitations set by stereotypes or prejudices about gender roles or the characteristics of men and women” (International Labour Organisation)
2. Gender equality means an equal visibility, empowerment and participation of both sexes in all spheres of public and private life. Gender equality is the opposite of gender inequality, not of gender difference, and aims to promote the full participation of women and men in society. It means accepting and valuing equally the differences between women and men and the diverse roles they play in society. Gender equality includes the right to be different. This means taking into account the existing differences among women and men, which are related to class, political opinion, religion, ethnicity, race or sexual orientation. Gender equality means discussing how it is possible to go further, to change the structures in society which contribute to maintaining the unequal power relationships between women and men, and to reach a better balance in the various female and male values and priorities”. (Council of Europe, 2016)

## **Notes**

This definition was adapted from the definition in the European Commission document ‘Strategy for equality between women and men 2010-2015’.

It was suggested by the Consortium to replace sex by gender since sex and gender are different concepts as reflected in the definitions below. Since we are talking about gender equality, gender was considered more appropriate. This definition was preferred by most partners and stakeholders since it was argued to be the only non-binary definition (the one that does not distinguish just between men and women) of the available definitions. The problematic nature of a binary understanding of gender was emphasised since there is a whole range of possible positions between the stereotypical understanding of women and men.

## Gender Equity

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### **PLOTINA DEFINITION**

Fairness of treatment for women and men, according to their respective needs and interests. This may include equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities

(International Labour Organisation)

### **OTHER DEFINITIONS**

1. “Gender equity entails the provision of fairness and justice in the distribution of benefits and responsibilities between women and men. The concept recognises that women and men have different needs and power and that these differences should be identified and addressed in a manner that rectifies the imbalances between the sexes.”(EC, Strategy for equality between women and men 2010-2015)

### **Notes**

The highlighted definition was preferred by most partners because it was considered more straightforward and easier to understand.

## Work-Life Balance/Work and Personal Life Integration

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### PLOTINA DEFINITION

#### **Work and Personal Life Integration:**

**Work** is part of life, and therefore to see it in terms of a work/life interface is misleading; and **‘Personal life’** captures the range of commitments and duties which an individual may have, and which can vary across the life course, while still allowing family to be a large part of personal life for most people.

*(ILO report –Fagan et al., 2012)*

(International Labour Organisation).

### OTHER DEFINITIONS

1. Work life balance refers not only to caring for dependent relatives<sup>1</sup>, but also to “extracurricular” responsibilities or important life priorities. Work arrangements should be sufficiently flexible to enable workers of both sexes to undertake lifelong learning activities and further professional and personal development, not necessarily directly related to the worker’s job. (International Labour Organisation)

#### Notes

The Consortium agreed that the Work and Personal Life Integration is a more appropriate concept than Work-Life Balance for PLOTINA since there were great difficulties in getting consensus about the ‘balance element’. The Consortium considered Definition 1 as useful in elaborating on the work and personal life included in the preferred definition. For example work arrangements should be sufficiently flexible to enable workers to undertake lifelong learning activities and further professional and personal development, not necessarily directly related to the

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<sup>1</sup>In the broader definition of “dependent relatives”, the Consortium has progressively agreed to include children, elderly and disabled family members.

worker's job and personal life should refer not only to caring for dependent relatives, but also to "extracurricular" responsibilities and important life priorities.

## Culture/Organisational culture

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### PLOTINA DEFINITIONS

**Culture** consists of patterns, explicit and implicit, of and for behaviour acquired and transmitted by symbols, constituting the distinctive achievements of human groups, including their embodiment in artifacts; the essential core of culture consists of traditional (i.e. historically derived and selected) ideas and especially their attached values; culture systems may, on the one hand, be considered as products of action, on the other, as conditional elements of future action.

(Kroeber & Kluckhohn 1952: 181; cited by Adler 1997: 14)

[Anthropological]

**Organizational culture** is a set of shared mental and implicit assumptions that guide interpretation and action in organizations by defining appropriate behavior for various situations

(Ravasi and Schultz, 2006, amended)

[Organisation Studies]

### Notes

The Consortium agreed to include both definitions because they would be both useful for this project since definition 1 comes from an anthropology perspective and definition 2 from an organisation studies' perspective. They were both endorsed by the Consortium.

We added implicit to the mental assumptions in the organizational culture definition to reflect the potential implicit assumptions that individuals have.

## Sex

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### **PLOTINA DEFINITION**

**Sex** is a biological quality or classification of sexually-reproducing organisms, generally female, male, and/or intersex, according to functions that derive from the chromosomal complement, reproductive organs, or specific hormones or environmental factors that affect the expression of phenotypic traits that are strongly associated with females or males within a given species

(Gendered Innovations Website)

### **OTHER DEFINITIONS**

1. Sex identifies the biological differences between men and women, such as women can give birth, and men provide sperm. Sex roles are universal. (EC, Strategy for equality between women and men 2010-2015)
2. A medical term designating a certain combination of gonads, chromosomes, external gender organs, secondary sex characteristics and hormonal balances. Common terms are “male, “female” and "intersex." (UC Berkeley Website, Gender Equity Resource Centre). Sex refers to the biological and physiological characteristics that define humans as female or male. These sets of biological characteristics are not mutually exclusive, as there are individuals who possess both, but these characteristics tend to differentiate humans as females or males (EIGE's Glossary- Thesaurus)

### **Notes**

The PLOTINA definition and definition 2 were both considered appropriate due to clear reference to medical/biological characteristics and the absence of binary distinctions. However the preferred one was endorsed by most partners in the Consortium.

We have added the definition from EIGE of sex referring to biological characteristics<sup>2\*</sup> (as real/material) because it can be useful for recognising biological similarities and oppression. At the same time though, we are aware of the debate and the risks about such a definition in relation to the homogeneity of such divisions and gender conditioning. While we consider that sex and gender are mutually constitutive (see also Butler, 1999<sup>3</sup>) for practical terms and for the purposes of our project, we distinguish between them to enable us in the collection of empirical data and develop gender equality plans to enhance representation and diversity at all levels in research performing organisations. Furthermore, this broad definition is useful for PLOTINA since one of its objectives is the integration of sex and gender variables in research (with a focus on disciplines that have not been traditionally integrated such as biology, zoology etc).

For a comprehensive account on feminist perspectives on sex and gender:

<https://plato.stanford.edu/entries/feminism-gender/>

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<sup>2</sup>This does not mean that we do not think that sex is also socially constructed especially in terms of how sex categories and bodies are constructed.

<sup>3</sup>If the immutable character of sex is contested, perhaps this construct called 'sex' is as culturally constructed as gender; indeed, perhaps it was always already gender, with the consequence that the distinction between sex and gender turns out to be no distinction at all. (Butler 1999, 10–11, [Gender Trouble, feminism and the subversion of identity: 1999](#)).

## Gender

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### PLOTINA DEFINITION

**Gender**—a socio-cultural process—refers to cultural and social attitudes that together shape and sanction "feminine" and "masculine" behaviors, products, technologies, environments, and knowledges. "Feminine" and "masculine" describe attitudes and behaviors on a continuum of gender identities. Gender does not necessarily match sex.

(Gendered Innovations Website)

### OTHER DEFINITIONS

1. Gender identifies the social relations between men and women. It refers to the relationship between men and women, boys and girls, and how this is socially constructed. Gender roles are dynamic and change over time. (EC, Strategy for equality between women and men 2010-2015).
2. Gender refers to the socially constructed differences and relations between males and females. These vary widely among societies and cultures and change over time. The term “gender” is not interchangeable with the term “sex”, which refers exclusively to the biological differences between men and women, which are universal and do not change. Statistical data are disaggregated according to sex, whereas gender characterizes the differing roles, responsibilities, constraints, opportunities and needs of females and males in all areas and in any given social context. (International Labour Organisation)

### Notes

The highlighted definition was endorsed by the Consortium because it distinguished between “sex” and “gender” and avoids the binary distinction between men and women. As mentioned in the notes section of the concept ‘sex’, the Consortium thinks that sex and gender are mutually constitutive but for practical purposes of this project (e.g. data collection is based on institutional records which use these categories), we distinguish between them.

## Gender identity

### PLOTINA DEFINITION

An individual's internal sense of gender, which may or may not be the same as one's gender assigned at birth. Some gender identities are "woman," "transman" and "agender" but there are many more. **Gender Identities** refer to how individuals and groups perceive and present themselves, and how they are perceived by others. **Gender identities** are context-specific.

(Adapted, see notes)

### OTHER DEFINITIONS

1. An individual's internal sense of gender, which may or may not be the same as one's gender assigned at birth. Some gender identities are "woman," "transman" and "agender" but there are many more. Since gender identity is internal it isn't necessarily visible to others. (UC Berkeley Website, Gender Equity Resource Centre)
2. A person's sense of being male or female, resulting from a combination of genetic and environmental influences and a person's concept of being male and masculine or female and feminine, or ambivalent. (EC, Strategy for equality between women and men 2010-2015)
3. Gender Identities refer to how individuals and groups perceive and present themselves, and how they are perceived by others (Schiebinger, 1999). Gender identities are context-specific and are constructed in both individual and collective relationships. Any individual engages in multiple femininities and masculinities (consciously or unconsciously), depending on the particular context. Transgender describes "expressions of gender characteristics, including identities that are not stereotypically associated with one's assigned sex at birth" (WPATH, 2011). Cisgender refers to people whose sex assigned at birth is aligned with their gender identity (Gendered Innovations Website).

### Notes

The Consortium decided to adapt the definition 1 adding the element of perceptions of gender identity by others and the influence on the context (using definition 3).

## Gender roles

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### PLOTINA DEFINITION

**Gender roles** are learned behaviours in a given society, community or other social group. They condition which activities, tasks and responsibilities are perceived as appropriate to males and females respectively. Gender roles are affected by age, socio-economic class, race/ethnicity, religion, and the geographical, economic, political and cultural environment.

(Gendered Innovations Website)

### OTHER DEFINITIONS

1. Gender roles are learned behaviours in a given society/community or other special group that condition what activities, tasks and responsibilities are perceived as male or female. Gender roles are affected by age, class, race, ethnicity or religion and by the geographical, economic and political environment. Changes in gender roles often occur in response to changing economic, social or political circumstances. (EC, Strategy for equality between women and men 2010-2015)

### Notes

Both definitions have been endorsed by a number of partners but the highlighted one was preferred due to the non-binary element and the inclusion of cultural environment as an important factor affecting gender roles. While the concept of gender roles has been criticized as a non useful concept (reinforcing the binary and the idea that there are attitudes that make an ‘ideal man’ or ‘ideal woman’), we consider gender roles as a helpful concept for this project in relation to the roles and the tasks that academic staff undertake and how these might differ.

## Stereotypes

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### PLOTINA DEFINITION

A **stereotype** is a widely held, simplified, and essentialist belief about a specific group. Groups are often stereotyped on the basis of sex, gender identity, race and ethnicity, nationality, age, socioeconomic status, language, and so forth. Stereotypes are deeply embedded within social institutions and wider culture. They are used to justify and maintain the historical relations of power. They are often evident even during the early stages of childhood, influencing and shaping how people interact with each other.

(Gendered Innovations Website – amended see notes)

### OTHER DEFINITIONS

1. Gender stereotypes are preconceived ideas whereby males and females are arbitrarily assigned characteristics and roles determined and limited by their sex. Sex stereotyping can limit the development of the natural talents and abilities of boys and girls, women and men, their educational and professional experiences as well as life opportunities in general. Stereotypes about women both result from and are the cause of deeply engrained attitudes, values, norms and prejudices against women. They are used to justify and maintain the historical relations of power of men over women as well as sexist attitudes which are holding back the advancement of women”. (Council of Europe Gender Equality Strategy 2014-2017, page 9.)

### Notes

The first definition has been endorsed by most partners. The Consortium added a sentence about power relations in the highlighted definition, which is part of definition 1.

## Gender mainstreaming

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### PLOTINA DEFINITION

**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 all stages, by the actors involved in policy-making.

(Council of Europe, 1998)

## Gender dimension (in research, in relation to WP4)

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### PLOTINA DEFINITION

**Gender dimension**” means integrating sex and gender analysis into research [...] integrating into all phases of basic and applied research—from setting priorities, to funding decisions, to establishing project objectives and methodologies, to data gathering, analyzing results, and evaluation.

(Gendered Innovations Website)

## Femininities and Masculinities

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### **PLOTINA DEFINITION**

"**Femininities**" and "**masculinities**" describe gender identities. They describe socio-cultural categories in everyday language; these terms are used differently in biology (see below). Because femininities and masculinities are gender identities, they are shaped by socio-cultural processes, not biology (and should not be essentialized). Femininities and masculinities are plural and dynamic; they change with culture and with individuals.

(Gendered Innovations Website)

## Gender Balance

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**Gender balance** is commonly used in reference to human resources and equal participation of women and men in all areas of work, projects or programmes. In a scenario of gender equality, women and men are expected to participate proportionally to their share of the population. In many areas, however, women participate less than what would be expected based on the sex distribution in the population (underrepresentation of women), while men participate more than expected (overrepresentation of men).

( Original Source: United Nations Statistics Division – UNSD. [Global Gender Statistics Programme](#); Secondary Source: EIGE)

### Notes

For gender balance in decision making, we welcome the EC targets underpinned in the strategy on gender equality in H2020 (40% in panels and groups) but we also recognise concerns of reaching this proportion in very small groups (e.g. less than 5) and in groups where there is a limited recruitment pool (the limited number of women reflects proportionally the share of the equivalent population it is drawn from)

## Gender Equality Plan (GEP)

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A Gender Equality Plan (GEP) is a set of actions aiming at achieving gender equality in an organisation. The GEP is often the result of the following phases:

- An analysis phase, in which sex-disaggregated data is collected; procedures, processes and practices are critically assessed with a view to detect gender inequalities and gender bias;
- A planning phase, in which objectives are defined, targets are set, actions and measures to remedy the identified problems are decided, resources and responsibilities are attributed and timelines are agreed upon;
- An implementation phase, in which activities are implemented and outreach efforts are undertaken so as to gradually expand the network of stakeholders;
- A monitoring phase, in which the process and the progress are regularly followed through and assessed. Findings from the monitoring exercise(s) allow to adjust and to improve interventions, so that their results can be optimised.

Therefore, a GEP is comprised of actions which aim to address issues related to gender equality identified through the abovementioned phases. It is thus tailored to the specific organisation it refers to. GEPs should be organic documents, constantly reviewed and updated.

(Adapted from EIGE [website](#) based on EC [document](#) and ECU's handbooks of Athena SWAN).

## Sexual harassment

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**Sexual harassment** is a form of gender-based violence encompassing acts of unwanted physical, verbal or non-verbal conduct of a sexual nature, which have a purpose or effect of violating the victim's dignity and creating an intimidating, hostile, degrading, humiliating or offensive environment.

Acts of sexual harassment are, typically, carried out in the context of abuse of power, promise of reward or threat of reprisal. (EIGE)

### Notes

This definition is from EIGE and it was based on the following two documents: (1) European Commission (2010). Feasibility report to assess the possibilities, opportunities and needs to standardise national legislation on violence against women, violence against children and sexual orientation violence; (2) Council of Europe (2011). Convention on Preventing and Combating Violence against Women and Domestic Violence and its Explanatory Memorandum, Council of Europe Treaty Series No 210.

## Care

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Care work may be very broadly defined as the work of looking after the physical, psychological, emotional and developmental needs of one or more other person(s). Care recipients are generally identified as infants, school-age children, people who are ill, persons with a disability, and elderly people.

Care providers typically include public and private health services, state-regulated or public-sector social workers, public or private care-provider agencies, enterprises of employment, voluntary and community organisations, faith-based organisations or networks, and relatives and friends. Different settings and modalities of care work apply to each of these categories.

(Original Source: International Labour Organization – ILO (2007).[ABC of Women Workers' Rights and Gender Equality](#).) –Secondary Source: EIGE)

### Notes:

Based on definitions of care produced by the Institute of Mediterranean Gender Studies we would also like to highlight the importance of care as a concept for the following reasons:

How care is related to the achievement of equality. The lack of affordable, accessible and high quality care services and the fact that care work is not equally shared between women and men have a direct negative impact on women's ability to participate in all aspects of social, economic, cultural and political life.

How care is often unpaid and the responsibility of informal care work may have a major impact on their health and well being of those who take responsibility for it. Informal care is largely invisible and the economic and social contributions of carers unacknowledged. It is estimated that over 75% of informal carers worldwide are women which brings a disproportionate burden on that part of our population.

## Family responsibilities

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**Family responsibilities** cover the care of, and support for, dependent children and other members of the immediate family who need help.

Women continue to shoulder a disproportionate share of the burden when it comes to raising children and taking care of other dependants. This fact impacts their employment, from taking on leadership roles through to retirement. It also restricts their entering, participating in or advancing in a broad range of public, political or cultural areas. (EIGE)

### Notes

This definition was found in EIGE and is based on the following documents: (1) Council of the European Union (2011). Review of the Implementation of the Beijing Platform for Action – Women and the Economy: Reconciliation of Work and Family Life as a Precondition for Equal Participation in the Labour Market. Council Conclusions; (2) European Union (2005), Glossary of Gender and Development Terms, in Toolkit on Mainstreaming Gender Equality in EC Development Cooperation (Chapter 1, section 3). Available at: <https://ec.europa.eu/europeaid/sites/devco/files/toolkit-mainstreaming-g...>

## Empowerment

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Describes both the process and the outcome of people – women and men – taking control over their lives: setting their own agendas, gaining skills (or having their own skills and knowledge recognized), increasing self-confidence, solving problems, and developing self-reliance. Empowerment implies an expansion in person's ability to make strategic life choices in a context where this ability was previously denied to them. In most cases, the empowerment of women requires transformation of the division of labour and of society.

(Source: Kabeer, Naila. "Reflections on the Measurement of Women's Empowerment", in *Discussing Women's Empowerment: Theory and Practice*. Stockholm: Sida Studies No. 3, 2001)

## Intersectionality

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In relation to gender equality, intersectionality is an analytical tool for studying, understanding and responding to the ways in which sex and gender intersect with other personal characteristics/identities, and how these intersections contribute to unique experiences of discrimination. It starts from the premise that people live multiple, layered identities derived from social relations, history and the operation of structures of power. Intersectional analysis aims to reveal multiple identities, exposing the different types of intersectional and multiple discrimination and disadvantage that occur as a consequence of the combination of identities and the intersection of sex and gender with other grounds.

(EIGE- Glossary)

### Notes

Intersectionality is a term defined by the post-colonial feminism, and was coined by American professor Kimberle Crenshaw in 1989. Along with Crenshaw, Patricia Hill Collins argued about the importance of intersectionality which she reported as:

*"The view that women experience oppression in varying configurations and in varying degrees of intensity. Cultural patterns of oppression are not only interrelated, but are bound together and influenced by the intersectional systems of society. Examples of this include race, gender, class, ability, and ethnicity."* (Collins, 2002, p.42)

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