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1. Gender equality – new approach, the challenges of intersectionality

We hereby present to our readers, research institutions and governmental institutions interested in taking action for gender equality the findings of the analyses and research performed within the first task of the GEQ Project, entitled Development of the New Gender Equality Framework. The goal of this specific study was to create a new framework for studying gender equality (GE) – a task devised around both theoretical and methodological components. The activities entailed solid grounding in critical analysis and a thorough overview of the existing frameworks, a literature review, a secondary data analysis, as well as a review of the methods and results of the earlier projects concentrated on and around gender equality. More specifically, this review included an analysis of the interrelations between GE, quality of life and social development, which aimed at incorporating these concepts into the new framework.

Drawing attention to the inherent interconnectivity, co-influences and synergy between the three elements of gender equality, quality of life and social development (social change) speaks to the pivotally innovative character and originality of the GEQ project. WP1 makes a vital contribution to shedding light on both the general (transnational) and the specific (national – Polish) conditions under which the social, political and cultural processes impacting on the abovementioned three constitutive dimensions occur.

This WP shapes the basis for further empirical and policy research. The reports included here investigate and evaluate different approaches to investigating and theorising GE. They also identify both the potential and the shortcomings of the already developed tools for approaching gender inequalities. The analyses should be seen as a starting point for the development of the new GE framework.

The concepts describing and explaining gender difference can be based on the following three approaches. First, there is the sameness approach, under which men and women are said not to differ. Secondly, there is the difference approach, where the underlying assumption concerns distinction. According to the latter approach, women do differ from men, yet said difference should not only be celebrated, but women should also be appreciated and compensated for their position as women, as resulting from the pre-existing conditions. Finally, the transformative approach can be seen as “a third way”, as here, instead of choosing between sameness and difference, “a new standard for both men and women is created, that is, the transformation of gender relations” (Walby 2005, 2009, cf.
Gender Equality Index Report 2013). According to the researchers discussing the transformative approach in the Gender Report (ibid.: 6-8, see: http://eige.europa.eu/sites/default/files/Gender-Equality-Index-Report.pdf), this stance wishes to transgress gender in the hope of problematising the gender world in itself, rather than a normative exclusion of either women or men (Verloo, 2005). All three approaches can be observed in the European Commission’s approach to gender equality over the last three decades (Rees, 1992) and are reflected in the EU policy documents concerning:

- **Tinkering** – equal treatment (legal redress to ensure treatment of women and men in the same way);
- **Tailoring** – positive action (recognising that differences between men and women prompt specific measures for addressing disadvantages experienced by women as a consequence of those differences);
- **Transforming** – gender mainstreaming (understanding how the existing systems and structures cause indirect discrimination, followed by altering and/or redesigning them to become more appropriate) (see http://reports.weforum.org/global-gender-gap-report-2014/economies/#economy=POL).

It is important to note that lively debates are now taking place in regard to the role of gender for shaping and formulating equality policies, as well as its links to other basic factors of status (e.g. Walby, Verloo, Lombardo, Rolandsen Agustín, Siim, Mokre, Kantola Kraus, Holter et al.). The biggest challenge at present is to somehow bring together the cultural, ethno-national and class diversity on the one hand, and the politics of identity, social mobilisation of actors, their recognition and integration, on the other.

The issue of gender equality yields a relevant question, often raised by some academics as well as gender equality practitioners, and pertaining to the popular **intersectionality** theories. These affect numerous studies, but might potentially blur and eventually weaken gender equality as an autotelic conceptualisation for establishing a universal gender equality framework. According to Verloo (2007), intersectionality may prioritise claims for diversity over gender equality struggles. The main point made by the authors is that by focusing on gender, class or race as distinct categories, intersectional scholars may avert the construction of the unitary gender equality models of relevant policies (cf. Hancock 2007). It is instead now underscored that “intersectionality must evolve further from a transnational context and that the transnational level provides new
opportunities for rethinking the European public sphere from the perspective of diversity”. As such, it is now generally necessary to thoroughly contemplate devising models of gender equality and the selection of criteria to be taken into account. Drawing on prominent scholarship, it may be said that diversity in the European Union is marked by an unusual form of “complex diversity” (Kraus 2012). As such, it entails inequalities that are not only complex (Walby 2009), but also numerous overlapping (Verloo 2012). The antidiscriminatory policies within the EU are not aligned (Kantola, Nousiainen 2012), which led Siim and colleagues to announce that until recently there existed a gap “between gender models concerned primarily with gender inequality and diversity models concerned primarily with ethno-cultural or religious differences” in Europe (Rolandsen Agustín, Siim, 2013). Subsequently, the earlier EU approach relying on gender equality and the novel preoccupation with diversity cause significant tensions in academic inquiries, especially when multiple inequalities are tackled via broad antidiscrimination legislation. Importantly, the findings of the Quality in Gender+Equality Policies (QUING) project suggest that said mapping of the multiple overlapping forms of inequality forefronted by the intersectional approach makes it challenging to examine it. Even more telling is the fact that the current national-level gender equality policies across European states were found to be void of an intersectional component (Lombardo, Verloo 2009). Conclusively, there is no clear indication on whether introducing multidimensional equality policies and foregrounding a broader antidiscriminatory legal framework is beneficial for the main goal of enforcing gender equality. Squires (2007) argues that two opposite stances are possible as, on the one hand, policies oriented towards addressing a vast array of different inequalities may push the specific foci of gender equality into the margins and essentially delay the achievement of equality in the gender area. On the other hand, the opposite view on developing sensitivity to broader inequality through an intersectional dimension may equally facilitate an acceleration of reaching all equality-centred goals (including gender equality). In that context, Squires offers a participative-democratic model of gender and diversity mainstreaming, which she derives from an integrated approach to both dimensions. Consequently, the novel research strategy is to be focused on the intersections between concrete civil society agents, actors and institutions, while also keeping in mind the current state of EU gender diversity policies, which will inadvertently address categories of multiple inequalities.

1 Focusing on the Polish context of building a multidimensional equality policy based on diversity, one observes an evident
2. The urgency of gender equality for Poland – a quality of life perspective

Before the actual framework of the WP1 is presented, it is necessary to briefly discuss the current situation in relation to gender equality in Poland, placing the focus on the level of importance associated with the problem viewed both from a theoretical standpoint and with regard to the actual implementation of the gender equality policy. The time assigned for the completion of the GEQ research project coincides with the period of Poland’s “war on gender”, which was initiated in September 2011, appears to have reached its pivotal high point in 2013, and yet is still ongoing. The gender equality and gender mainstreaming policies introduced under the European Union laws are endangered, and the fragile foundation they were built on is being dismantled. Conservative milieus, exemplified in certain actions of high-ranking dignitaries of the Polish Catholic Church, use various ways of attacking the ideas and practices of democratisation in relation to gender and LGBTQ rights, diminish the scale and reality of the instances of gender-based violence and manifest an opposition stance on signing the Convention on preventing and combating violence against women and domestic violence. They further negatively evaluate institutional changes that aim to dismantle the unequal socialisation of schemes and scripts at schools and kindergartens. This is achieved by various cases of discrediting textbooks depicting partnership-based division of family roles and the concepts of “diversity”/“otherness” in their broad sense, as well as attempts at overruling the legal rights to termination of pregnancy guaranteed in the binding 7.l.1993 abortion bill.

lack of integration of various bodies and institutional forces (e.g. labour unions, NGOs, Ministry of Labour and Social Policy, Polish Church), as well as the subjects experiencing multiple discrimination themselves. A quite recent example could be the 2014 case of seamstresses working in a highly gendered segment of the labour market and employed by the company Trend Fashion in the Polish town of Myślenice. In July, they began a strike demanding a 100 PLN pay rise (which would amount to one extra grosz per item produced) to their extremely low 1300 PLN monthly salary basis. Illustratively, this amount of 1300 PLN is equal to the price of the cheapest single suit sold by the company. Demonstrations of support followed for the exploited, low-educated women who live in an area with very high rates of unemployment and are often the sole providers in their families. However, the protests on the part of the National Labour Union “Inicjatywa Pracownicza” (https://ipkrakow.wordpress.com/2014/09/14/list-do-odbiorcow-trend-fashion/), as well as academics and many internet users, were deemed anarchistic and leftist. The “Decent sewing – decent living” slogan (“Godne szycie –godne życie” in Polish) was ridiculed by many media outlets, trivialising the real problem of exploitation. The local and national authorities, labour groups and biggest trade unions (e.g. NSZZ Solidarność) not only did not solve the problem (the workers were let go and then rehired with new contracts), but did not even propose a discussion on forming a model of policy which could assist in addressing the common instances of global exploitation and help fight the exclusion and marginalisation of women. Despite the EU policies in place, Poland has a long road ahead in regard to its capacity of formulating a universal equality policy and anti-discrimination policy, as well as a framework that would take into account the contexts of national and cultural facets of neoliberal capitalism, as well as the significance of gender for bond formation and the sense of agency.

These specific conditions include 1) a pregnancy being an endangerment to the life or health of the pregnant woman, 2) antenatal care tests or other medical rationales leading to a high-probability discovery of severe and irreversible damage to the foetus or indicating the presence of a non-curable disease that threatens the life of the foetus (prior to a foetus being
The conservative power players present their actions as legitimised by the rule of God, defending doctrines stemming from biological essentialism, which are historically known for being discriminatory, exclusionary, and leading to inequalities, segregation and wars. Inequality-driven gender contract is easily identifiable in Polish everyday practices and gender stereotypes, which are particularly resistant to new experiences and new laws, remaining in operation for much longer than the actuality of situations and information that created them would suggest. The aforementioned social groups engaged in the war on gender disrupt the already unstable grounds of gender equality in the private and public spheres (see the reports by Kowalska, Migalska, Warat, Lisowska), which slowly improved from 1918 (voting rights granted to Polish women), and subsequently began to be limited from 1990 onwards (the beginning of the systemic transformation). One of the hypotheses put forward is that a return to capitalism in the economic sphere, paired with the processes of democratisation within political life observed in present-day Poland, is accompanied by an overt tendency for a re-establishment of the traditional, patriarchal family model, which was earlier weakened by female aspirations for self-fulfilment in public life, effectively ignited by the state during the socialist period. In consequence, women are being excluded from the public sphere, and simultaneously stripped of full citizenship or assigned a specific type of citizenship different from that of men (Zielińska 2011).

The gender-specific backlash in Poland is not a purely local phenomenon, as it fits into broader global anti-gender trends reborn in the United States, Germany and Russia. The aggressive fight against equality and gender justice reinforces gender stereotypes, traditional models and gender relations, cementing the minority status of women and other “others” in society. It deprives them of subjectivity (agency) for manifesting gender and sexual identities, as well as denying appreciation for one’s experience and needs in the face of postmodern social changes. Furthermore, it means leaving no doubt as to who has the power and over whom the power is exercised, highlights the source of power, illuminates how power is sustained and distributed in the society, and pinpoints these in power to make decisions and regulate the information flows concerning “gender threats”, as well as the owners of the specific media outlets responsible for waging the war. It is vital to note that in the field of the war on gender, there is only one gender (women) that is supposed to

capable of surviving outside the womb), and 3) existence of a justified suspicion that the pregnancy resulted from a crime (on condition that it has lasted less than 12 weeks and an attestation is issued on the matter by a district attorney).
function as the pillar of organisation and order in society. Joanna Podgórska notes that “what is perceived as disgraceful for a woman often remains excusable for a man: he can be violent, under the influence, fail to support his family. A woman must be an ideal mother and wife. It is inappropriate for her to use force, even in self-defence (Polityka weekly, issue 41/2014, “Fight over violence”). The culturally religious corset imposed on women seems to be not only repressive but also regressive in regard to the rights attained through earlier struggles, continuously reinforcing a mortification dimension of femininity (linked to sacrifice, devotion, servitude, and obligation towards others).

In the Pastoral Letter of the Polish Episcopal Conference, which was made public and read in churches in December 2013, the representatives of the clergy claimed that:

“[g]ender ideology is the product of many decades of ideological and cultural changes that are deeply rooted in the Marxism and neo-Marxism endorsed by some feminist movements, as well as sexual revolution. (...) It maintains that biological sex is not socially significant and that cultural sex, which humans can freely develop and determine irrespective of biological conditions, is most important. (...) The danger of gender ideology lies in its very destructive character for mankind, personal contact and social life as a whole. Humans unsure of their sexual identity are not capable of discovering and fulfilling tasks that they face in their marital, family, social and professional lives” (Korolczuk 2014).

Among many other similar efforts, such as protest marches, petitions, public pronouncements, media campaigns and even anti-gender training courses, this letter presents the rationale behind an array of actions taken by the Catholic Church, conservative politicians and lobbies, as well as multiple formal and informal groups that tasked themselves with fighting the invasion of the “gender ideology” in Poland. It is common for the “war on gender” initiatives to wish to be seen as the only hope for “saving our children”, and also to rely on the narrative of the forsaken civilisation that will result from the gender ideology.

Paradoxically, this involves a puzzling “discovery” of the term “gender” as novel, despite its strong presence in Polish science since the 1990s, working in particular as a pillar of social sciences and humanities, and the dynamically prominent research in the field.3

3 This unprecedented explosion of new research led to the emergence of scientific research centres, as well as establishing of new degree and specialisation programmes at bachelor’s, master’s and PhD degree levels. Our Institute of Sociology at
Using Harriet Bradley’s term (2007: 10), we can state that an *in concreto* uncovering of the gender inequality dimensions jigsaw constitutes a *genderquake* of a certain type, signifying a breaking point of the current (or incomplete) awareness of gender issues in Poland.

Taking on the rich and diverse problematic of gender equality in Polish society was and remains necessary as a response to the changes initiated by the socio-economic transformation which induced the processes of democratisation and equalisation in the broadest terms, as well as new inequalities and exclusions. Moreover, tackling gender equality topics is an important response to the challenges generated by the economic and cultural globalisation, as well as the processes of Europeanisation, which signify instating new legal norms with implicit gender components (*gender mainstreaming* policies). Employing the category of gender allows for articulation of the social and economic ordering of gender differences. This *ordering* is understood here as rules imposing meaning and scope of differences, and consequently establishing said rules as governing gender relations in a given society and culture (Titkow 2011).

Let us now refer to several objective measurements illustrating the gender equality-related situation in Poland. Country-specific contexts are monitored by various international, national and transnational research institutions connected to, for instance, the European Union and the UN. A range of objectively constructed scales, measures and indexes has been introduced (Łapniewska 2014). The 2013 Gender Equality Index Report prepared by the European Institute for Gender Equality encompassed such dimensions of equality/inequality as work (participation in employment, segregation, quality of work), money (financial resources and generalised economic standing), knowledge (educational attainment, segregation in schooling, availability of life-long education), time (care-, economic-, social activities), power (political, social, economic power), and, finally health (health condition, health-oriented behaviours, access to healthcare). It transpires that Poland was ranked 19th among the 27 European countries examined within this study. It received the rather low score of 44.1 points (a perfect score being 100). The highest rankings were achieved by Sweden (74.3), Denmark (73.6) and Finland (73.4). Looking at the Central and Eastern European region, it can be noted that the Czech Republic and Latvia beat Poland’s score, while Lithuania, Hungary, Bulgaria and Romania were positioned lower. The general rate for

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the Jagiellonian University serves as a good example of this situation, with a newly established degree programme, “Socio-cultural gender identity”, conducting unique research and teaching activities. The programme stands out in the European educational landscape for employing critical, intersectional, national and transnational perspectives.
the 27 countries of the European Union was 54. For Poland, the particularly “low”-ranked dimensions included: time, at 20.9 (in comparison, it had a value of 63.9 for Sweden and 38.8 for EU-27); health, at 82.6 (93.1 for Sweden and 90.1 for EU-27, respectively); work, at 61/4 (78.6 Sweden, 69.0 EU-27); money, at 52.2 (Sweden 80.2, EU-27- 68.9); knowledge, at 44.0 (Sweden 66.3, EU-27 48.9); and power, at 43.5 (Sweden 74.3, EU-27 38). Similarly, it is helpful to look at the newest World Economic Forum 2014 Global Gender Gap report (http://reports.weforum.org/global-gender-gap-report-2014/). The report underlines that the goal of the Global Gender Gap Index is to measure the relative gaps between women and men residing in different countries in regard to the core four areas of health, education, economy and politics. The document pinpoints significant discrepancies between men and women in Poland, additionally worrisome in light of their increase in comparison to the results of the past years. While Poland placed 43rd among 115 countries studied in 2006, it fell to 54th position in the 2013 ranking of 134 countries. Furthermore, in 2014, Poland ranked 57th (among 142 countries), with a general index of 0.705 (where 0.00 means complete inequality and 1.00 reflects full equality). Examples of scores include 61st position in economic participation (although equality regarding the same wage for similar work was in 120th position), educational attainment (36th), health and survival (37th), and, finally, a particularly troubling result for political empowerment – 68th place in the global ranking.

These findings are alarming, suggesting that there is truly much to be done by the Polish state to eradicate these inequalities and, consequently, improve the quality of life. For now, Poland diverges substantially from the richest countries having good practices for acknowledging the role of gender equality in developing the democracy. Moreover, the policies pertaining to gender equality are generally imposed and enforced by the EU regulations in what is deemed a “Europeanisation of Polish gender equality politics”. In fact, however, the gender equality goals are consistently marginalised and overlooked in the strategic plans for socio-economic development (see Kowalska, Warat, Migalska).

3. Development of the new gender equality framework: from gender equality measurements to quality of life. Gender equality challenges in Poland

The first part of reporting within the WP1 (Development of the New Gender Equality Framework) consists of seven articles prepared by the Polish and Norwegian partners of the GEQ project. The presentation is logically structured on a particular continuum, for which
two texts constitute a departure point. These opening articles supply a discussion on gender equality measurement ("Measurement of Gender Equality – Analysing Dimensions, Embracing Areas, Considering Contexts" by Ewa Krzaklewska) and the challenges of the GEQ project, as well as an overview of the development of gender equality research in Norway, inclusive of the major GEQ 2007 achievements and their worldwide impact on broader research ("The Development of a Norwegian Model of Gender Equality Research" by Øystein Gullvåg Holter). In the next two reports, the attention of WP1 is shifted to a crucial topic linked with gender equality, namely quality of life ("Well-being and Social Development in the Context of Gender Equality" by Zofia Łapniewska; "Quality of Life and Well-being" by Beata Tobiasz-Adamczyk and Barbara Woźniak). The development of the aforementioned continuum is evident in the following texts tackling the specifically Polish context in relation to gender equality, observed across different spheres of life, as well as pinpointing needs in the area of gender policy and their possible development strategies ("Gender Equality in the Labour Market and in the Workplace. The Case of Poland" by Ewa Lisowska; "Who won the Polish Transformation? Gender Dimensions of Reforms in Poland" by Beata Kowalska, Marta Warat and Aleksandra Migalska). The WP1 volume is concluded by a view from the Norwegian side in a text dedicated to a critical analysis of the Norwegian GEQ 2007 project, covering new topics in the current research and fitting into the discussions about the impact of neoliberalism on gender equality ("Critical Assessment of the Norwegian Study Gender Equality and Quality of Life" (GEQ 2007) by Trine Rogg Korsvik).

Work Package 1 is opened by Ewa Krzaklewska’s article. Her work in “Measurement of Gender Equality – Analysing Dimensions, Embracing Areas, Considering Contexts” defines the theoretical and empirical framework of the project. The article is therefore vital for understanding the importance of the GEQ project, serving as a type of “guidebook” for uncovering the core of gender equality measurement. The article outlines several main goals regarding gender equality measurement:

- Discussing its two conceptual characteristics important for quantitative measurement, its complexity and contested character;
- Showing the ways in which the concept is operationalised by discussing analytical dimensions studied within earlier research projects, such as gender equality orientation, gender-equal practices and power relations;
• Identifying a certain knowledge gap in the form of those areas that have been less explored to date and therefore require more insight.

Ultimately, the recommendations for a theoretical framework are among others presented as designed for studying gender equality within the GEQ project. Therefore, the task underpinning the paper is to constitute the basis for the new framework of studying gender equality in the project “Gender equality and quality of life – how gender equality can contribute to development in Europe. A study of Poland and Norway” (GEQ). Krzaklewska reiterates the main goals of the project and links them with the Norwegian research project Gender Equality and Quality of Life 2007 (Holter, Svare, Egeland 2009). She underlines that the GEQ’s aim is to design a research tool (survey questionnaire) for studying gender equality in connection to the quality of life dimension and social development. This instrument is to be used in Poland and has the capacity for a potentially broader application in Europe and beyond. This broad, yet detail-oriented discussion is intended as a reflection on diverse definitions and uses of the concept of “gender equality”, as well as the areas and target groups considered to date. This explains why the primary focus was placed on conceptualisations and operationalisations stemming from the setting of social science research. Drawing on the relevant literature, Krzaklewska states that gender equality (GE) is one of the most complex and contested concepts in recent decades, both in Europe and worldwide (see also Verloo, 2007). The author argues that it is precisely these two aspects – complexity and contestability – that can be seen as the root cause for the difficulties with measurement of gender equality. An exhaustive list of gender equality conceptualisations is outlined and discussed in the light of the breadth of international research.

Referring back to the Norwegian study, which was an inspiration for the current project, Krzaklewska demonstrates how gender equality was conceptualised there as multidimensional, with the framework encompassing five dimensions of gender equality: gender-equal attitudes, gender-equal practices, resource distribution in cohabiting couple (hetero) relationships, gender formation and gender equality during childhood and youth. Despite acknowledgement of the multidimensional character of the concept, the Norwegian study did not arrive at any overall concept of gender equality. Secondly, gender equality concept is seen as contested, at both the political level (as a political and strategic goal) and the individual level (e.g. as a uniform norm). It is important to note that, in this sense, gender equality should be theoretically constructed not as a “state” or a “macro-structural
condition”, but rather as a process – a negotiated and changeable aspect of people’s lives. Krzaklewska strongly emphasises that the way in which gender equality is understood and experienced by people situated differently in regard to important social categorisations must be investigated.

A selection of the most relevant global quantitative research projects, such as the European Social Survey (ESS), Gender and Generation Survey (GGS), International Social Survey Programme (ISSP) or World Value Survey (WVS), are reviewed and analysed in order to show how gender equality is conceptualised and, consequently, how it is measured. The author critically assesses the dimensions most commonly used in the quantitative research presented, namely:

- **Gender equality as an attitude – measuring gender equality orientation.** In international survey projects framed in this way, questions relate mostly to gender equality attitudes and examine said general attitudes, as well as opinions on gender equality as a political goal. Questions on selected practices – mostly connected to sharing household and childcare duties – are quite frequent, while those on decision-making within partnerships or balancing work-family duties and spheres are rare.

- **Gender equality as practice – in the family and at work.** Research on gender equality practices centres around family practices and, most importantly, the equal sharing of domestic and care duties; in the employment arena it highlights issues of labour market discrimination, e.g. unequal treatment as far as recruitment, promotion or income levels are concerned. The various meanings of tasks, obligations and responsibility for family practices and attitudes are discussed. Based on a variety of findings, it is emphasised that gender-equal practices are important not only within relationships of partners, but also other relations, for instance between parents and children, or elderly parents and their adult children. Analogously, the research areas concern different aspects of the work environment – including procedures connected to recruitment, advances, professional development, harassment and bullying, as well as balancing family and work duties, with the relevant support in this area included.

- **Gender equality as equal power in relations.** A plethora of understandings is discussed, with new research studies indicated in this sphere, but more generally, the approach prominent in the reviewed studies has its roots in resource theory.
Consequently, power is often operationalised here in the form of the resources that one possesses, especially meaning those linked with a capacity or power to act. Some of the resources taken into account across the diverse studies include education, income, occupational position, type of employment (part-time or full-time), control over household economy (finances), and house ownership. Overall, the economic factor is the most telling when it comes to the usage of valuable resources by the partners. Power is also studied through the patterns of decision-making, such as choices referring to bringing up children, spending leisure time, and finance management – both regularly in everyday lives and in planning bigger expenses.

The text strongly highlights the value of employing the life-course perspective and including diverse areas of gender equality experience when embarking on a study of gender equality. Employing this perspective (e.g. in Norwegian research) allows the strength of the gender equality effect (or lack thereof) during childhood and youth to be shown, as a predicate for gender equality in later life stages. For example, the Norwegian study (Holter et al., 2009) has demonstrated that the risk of violence in homes where the father had more power in decision-making was almost three times greater than in gender-equal homes. Reviewing multiple studies, Krzaklewska shows that gender (in)equality may be manifested differently across the various phases of life, and therefore the dimension of age needs to be taken into account.

The second approach discussed in the article accounts for the necessity to explore practices in often overlooked additional life spheres, such as sexual relations, violence, or participation in civil society and/or in the local community. Drawing attention to practices and resources in their local context is, as Krzaklewska points out, a serious challenge in efforts towards recognising inequalities.

The final part of the article concludes that the GEQ study needs to consider gender equality as multidimensional. Diverse analytical dimensions should be included in the study, paving the way for capturing both the “objective” and the “subjective” evaluations of gender equality. Krzaklewska pinpoints the need for including the important dimensions of the GE study, such as gender equality as agency, or gender equality in civic and public life from the perspective of an individual participant. She emphasises that gender equality should be considered within multiple contexts, so that the study can map the complex interrelations between areas and dimensions of gender equality. Finally, she claims that “we need to
differentiate between gender equality as an ‘experience’ and gender equality as a ‘condition’ (structural context that impacts an individual quality of life and possibly a realisation of gender equality on the individual level)”. Here, the importance of qualitative research for understanding and practising gender equality is also noted.

Drafting a particularly broad diachronic and multidimensional perspective on the development of gender equality research, Øystein Gullvåg Holter’s text “The Development of a Norwegian Model of Gender Equality Research” is one of the more original, empirically and theoretically fruitful endeavours in the WP1 collection. The paper describes the far-reaching landscape of the research trends related to the issue of gender equality in Norway, crucially introducing significant developments with the discipline of men and masculinity studies. A presentation of the Norwegian research tradition leads to detailed multidimensional survey studies of gender equality, with the model developed being used as the main basis for the upcoming 2015 GEQ survey.

The four main issues discussed in depth include:

- “A wide societal theory view, including analyses of the production and reproduction spheres
- early debates on men as potential allies in GE development
- survey and interview study method developments with a focus on men
- extensive Norwegian and international research networking and cooperation in the area” (Holter 2014).

Furthermore, Holter discusses the novelties of the detailed survey model, primarily in terms of a theoretical model, method, design and some main results of theoretical and methodological significance. He puts forward descriptions of some examples of Nordic and EU project cooperation, especially in extending and developing the survey model and including international studies. Recent developments, such as new research on the effects of paternity leave, boardroom reform, the politics and structure of GE policy, gender balance and others, are also reviewed. Holter concludes by summarising the main theory developments and most significant steps forward, as well as by anticipating some problems and challenges ahead. The Norwegian example is particularly interesting for its documentation of the development of men studies and including men in the politics and practices of gender equality. Holter offers a reminder that the change did not happen overnight by recalling precursory research and the paths to its completion. Historically
relevant dates (e.g. 1988, 1990, 19943, 1993 and 2007) signify turning points in the
development of gender equality research, not only for Norway but for Europe in general.
The initial *Men in Norway* study (1988) constituted grounds for conducting the more
theoretically and methodologically advanced *Gender Equality and Quality of Life 2007 (GEQL
2007)* research, which took on some more prominent social topics and benefited from the
grander explicatory power of economic, sociological and feminist theories. Overall, it
underlines that –

“[t]he possibility of men as part of the development of gender equality should be
tested. Women’s researchers and gender researchers became more willing to take
men into consideration in their own research, even if the research financing was still
very tuned to the needs of women, rather than requirements from both genders for
creating a gender-equal society” (Holter 2014).

One of the leading studies in the world, *Gender Equality and Quality of Life 2007* included
women as well as men, rather than men only (as in 1988). Holter points out that the
development of GEQL 2007 involved the research goal of expanding a new detailed survey
standard that was to primarily confront and cross-examine the problem areas that were
later to be applied to the “regular” issues affecting the population at large. While some
dimensions were conventional, others were innovative – in the hope of capturing the causal
relations, Holter shows that the unprecedented success of the Norwegian researchers is the
internationalisation of gender equality research topics, as well as the “Norwegian export” of
now widely used methodologies and tools.

The following two contributions of WP1 coherently diagnose and explain two key topics
pertaining to the quality of life/well-being, as well as social development, gender equality,
and their respective measurement. These two articles are “*Well-being and Social
Development in the Context of Gender Equality*” by Zofia Łapniewska and “*Quality of Life
and Well-being*”, co-authored by Beata Tobiasz-Adamczyk and Barbara Woźniak. Owing to
the particularly broad theoretical framing of the quality of life, the two works have not only
a diagnostic but also a synthetising character, thus allowing discussions oriented to the
future research and measurement of gender equality. What gives these two contributions a
distinct advantage is their multiplicity of theoretical conceptualisations and varied
theoretical backgrounds relevant for the themes raised in this volume.
To achieve the goals set for her text, Łapniewska begins her article with an overview of different definitions and conceptualisations of well-being, subsequently focusing on the notions of social change, social development and happiness. She then moves on to strictly gendered issues within quality of life. Łapniewska draws on canonical and inspirational concepts in the field, recounting works by Kahneman, Nussbaum, Diener, Doyal, Gough, and Sen. Undoubtedly, Kahneman made a compelling point about the immanent difficulty with formulating definitions of the quality of life, shown by the fact that people “generally do not know how happy they are, and every time this question is posed to them, they have to construct their answer anew” (1990). It is stimulating in this context to include Amartya Kumar Sen’s theory of capabilities (1993) for evaluating the quality of life. This theory underlines the importance of individual freedom of choice between different options under the existing constraints. Łapniewska’s arguments pertain to both a subjective (individual) perception of well-being and an objective fulfilment of needs (e.g. satisfaction from one’s social relations). The author underlines that a basic split into subjective/objective is notable in the large body of literature providing the theoretical grounds for well-being research, pinpointing various criteria for evaluating a life’s quality. Therefore, it is important for Łapniewska to note those explanations that not only encompass objective determinants of the quality of life, but also refer to subjective perceptions of well-being, specifically acknowledging the significance of capabilities. For many people, the quality of life or a good standard of living signifies a possibility for fulfilment of one’s desires. However, the cultural and economic conditions (e.g. poverty, inequality in access to resources) connected with social development strongly impact the actual point of such desires and the chances for their fulfilment.

It is commendable that Łapniewska acknowledges the Polish achievements in researching issues of quality of life and equality (such as the “Social Diagnosis”/“Diagnoza Społeczna” research by Czapiński and Panek, among other examples). Again, the strength of Łapniewska’s contribution lies in the fact that the earlier studies on quality of life indicators are not simply enumerated, but rather critically assessed, along with the particular elements considered therein that bear significance for measuring the quality of life. The author thus compares the explanatory value of various indicators by pinpointing their strengths and weaknesses – or advantages and defects – for researching gender equality. The debate also yields an analysis of aspects and approaches helpful to the GEQ project team in the process.
of designing the new and groundbreaking framework. In total, Łapniewska lists and discusses 13 indexes indicative of the general attempts at measuring life quality. These are the *Gallup Healthways Well-Being Index*, *Basic Capabilities Index*, *Human Development Index*, *Index of Sustainable Economic Welfare and Genuine Progress Indicator*, *Genuine Savings Indicator*, *Value Aggregators Method and Social Diagnosis*, *National Wellbeing*, *Canadian Index of Well-being*, *Better Life Indicator*, *SPIRAL*, *Quality of Life Indicator*, and *Multidimension of Poverty Index*. It is important to reiterate the diversity of the components across all these indicators, as they rarely rely solely on objective factors (e.g. education, life expectancy, income per capita, health, employment security, and climate), but often consider more subjective elements such as emotional health (GHWBI), leisure, cultural participation and lifestyle.

Special attention is rightly given to those indexes which are gender-relevant. These are the *Gender Inequality Index*, *Gender Equity Index*, *Global Gender Gap Index*, and *Women’s Economic Opportunity Index Gender*. These measurements incorporate certain interesting and diverse dimensions, such as political empowerment, labour policy and practice, social status, and access to finance. Łapniewska also discusses other measures developed across various countries, for instance in Norway, Canada and Australia. She further notes the *Mainstreaming Gender Scorecard* for its aim of effectively measuring organisations’ development towards gender equality. The study also presents the most relevant gender equality data sources. The indexes included in Łapniewska’s work reduce the gap between the discourse on gender equality and the methods of measuring inequalities between women and men.

Łapniewska’s work facilitates a better understanding of the variety of approaches to defining both well-being and gender equality. It also sketches the methodological challenges that now lie ahead for the GEQ research team members. Furthermore, it underscores the large number of new dimensions that should be included in quality-of-life research conducted from a gendered perspective, making note of class, race, ethnic origin, age, disability, religion and psycho-sexual orientation, to name but a few. In conclusion, a framework focusing only on the gender perspective seems to be rather narrow, and the author suggests that “once the GEQ index is worked out, it would be good to make revisions and additional fieldwork research in the future to capture these changes”.

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Unlike Łapniewska, Tobiasz-Adamczyk and Woźniak, in their article “Quality of life and well-being”, mostly deal with subjective indicators, definitely doing so in more detail. A review of diverse approaches to the issue of measuring the quality of life (including the quality of life conditioned upon health) is provided. Ultimately, this leads to the conclusion that the optimum quality of life model recommended for use under the GEQ project is a multidimensional framework offered by the WHO, with the additional dimension of agency. Under the WHO’s definition, quality of life is understood as an individual way of perceiving one’s life situation, considered in a cultural context and reflected through the lens of the value system which governs one’s life, as well as the tasks, expectations and standards appropriated by the environmental conditions (WHOQOL Group 1997). This conceptualisation of the quality of life can be evaluated against the physical and mental health of individuals, their level of independence, the scope of social contacts and relations with the environment, as well as their personal beliefs and convictions. According to the WHO, quality of life comprises several dimensions: physical, emotional, social, functioning state, environmental and spiritual. At the level of each indicator, it is possible to delineate a range of indexes. For example, the indexes taken into account for the emotional dimension of the life quality include a capacity to express and accept one’s feelings, ability to control one’s emotions, as well effective ways of dealing with a stressful situation. Analogously, the ability to interact with one’s social setting, satisfying relationships with other people or activism in the public sphere all constitute aspects of the social dimension.

The authors underline that the WHO-designed framework is one among many existing conceptualisations of life quality. Nevertheless, once it is expanded to encompass the dimension of agency (understood as the sense of having a say (or influence) over one’s own situation and environment, being able to act for the common good), this framework seems to be the most extensive and adequate for researching quality of life in reference to gender equality. Comparing the WHO model with the list of capabilities put forward by Nussbaum, it emerges as apparent that all WHO-listed dimensions have their equivalents in the prominent conceptualisation offered by Nussbaum. Both approaches consider physical health, ability to work, mental state and emotions, social relations and a sense of belonging, environmental conditions (e.g. a sense of security or freedom), as well as, to a degree, spiritual well-being (understood not in relation to religion, but as a capability of formulating one’s notion of good/sense). With 10 components, Nussbaum’s list is broader than the WHO’s enumeration,
which does not include equivalents of life opportunities (till the moment of death), the capability of co-existing with other species (animals, plants) and caring for them, as well as the capability to control one’s setting in a political sense (making political choices, having a right to vote). In the former case, it must be noted that, firstly, the capability to live (meaning living a life unmarked by the risk of premature death) can be perceived as a consequence of accumulated other dimensions (especially related to physical health, but also emotional and social ones), while, secondly, the capability for co-existence with other species has no gender dimension. Thirdly, the capability of influencing one’s surroundings/environment can be included in the “agency” dimension, constituting an addendum to the list of dimensions proposed by the WHO. Simultaneously, it is one of the contributions that the GEQ project intends to make in the area of the quality of life conceptualisations and measurements. Finally, it is crucial to state that Nussbaum attaches substantial value to the issues of individual freedom, security and violence. This problematic cannot be overlooked in the quality of life research conducted from the gender standpoint. Therefore, this area will be featured in the prepared research tool.

The final part of WP1 consists of two Polish and one Norwegian exemplification of gender equality issues, which take into account the costs of the social transformation and the impact of neoliberalism on certain spheres of life. Both texts depict how gender equality should be researched in these new contexts under the GEQ project discussed here.

The first text – “Gender Equality in the Labour Market and in the Workplace. The Case of Poland” – was prepared by Ewa Lisowska, a renowned expert in the field of gender equality and the labour market. The objective of this paper is to answer the question of whether the labour market in Poland is characterised by gender equality or gender inequality. The presentation of the measures used hitherto is intended to map the current situation in the workplace. The presented analyses make it possible to pass a judgment on the Polish situation vis-à-vis global and European guarantees on compliance with gender equality standards. Lisowska shows that the symptoms of discrimination against women are observed both in Poland and in other European Union member states, despite the fact that de jure equality of women and men has been legally ensured. Although equal treatment of women and men is embedded in the United Nations mission and constitutes one of the priorities of the European Union policy, the law in itself does not secure gender equality in practice. Lisowska therefore illuminates how Poland positions itself with regard to ratifying
the basic EU documents on fighting discrimination and in respect to obeying the European law.

Lisowska uses various information sources, including her own research, to document the overall unequal labour market conditions. The selected data sources constitute valuable factual material which facilitates depicting the female and male situation in Poland as well as comparing their standing to that of the residents of other EU countries, especially regarding employment and unemployment. Compared with other EU countries, employment rates in Poland are lower than the European averages for both men and women, by 4.9 and 2.1 percentage points respectively. Women are in an evidently disadvantageous situation compared to men concerning unemployment. Between 1992 and 2013, each year the unemployment rates in Poland were higher for women than for men, and the problems with finding employment is one of the reasons for the relatively high proportion of women among self-employed people in Poland (34% in 2013).

Against this backdrop of the overall employment situation, more specific dimensions are described, namely those connected with the depth of inequalities on the labour market. These include:

- Job advertisements and indirect discrimination
- Gender-related occupational segregation.

Lisowska points out that as late as 1996, some regulations restricted women from taking employment in over 90 occupational activities, including as a bus or truck driver, diver or miner. The eradication of this discriminatory list of professions forbidden for women occurred in Poland relatively late, in 2002, and from then onwards, women have increasingly taken up “male” occupations. For example, more and more women are becoming bus or tram drivers, and more women are interested in joining the police force or military services.

- Remuneration of women and men – women earn less.
- Women holding managerial positions in the context of profits from diversity.

By adopting and implementing specific European Commission regulations, the European Union member states should see a change towards a relatively fast growth of the number of women in decision-making bodies, considered an effective means for overcoming prejudice and drawing attention to female competences and achievements.
• Reconciliation of work and family life. All enquiries document vast gender inequalities in reconciling the work and family life spheres. Women dedicate twice as much time as men to caring for family members and doing household chores.

The presented analysis demonstrates that there are many manifestations of worse treatment of women in the labour market, evident in fewer job offers, perception of female candidates in the context of motherhood, lower remuneration, and very few women holding top executive positions. The Gender Equality Index designed for all EU member states by the European Institute for Gender Equality (EIGE) in 2010 confirms the persistence of significant inequalities between women and men in the Polish society.

Lisowska’s original research on the measures of gender equality in the workplace, including the Gender Index and the Diversity Index working proposals, is also discussed in the paper. Dating back to 2005-2006, the Gender Index was designed as an objective tool for determining whether an enterprise/institution/organisation carries out an equal treatment policy in terms of access to employment, training and promotion. It examines whether an entity in question meets the standards concerning equal pay for equal work, is friendly towards female and male employees with children, and supports the mechanisms for reconciliation between work and family responsibilities as well as measures for successful safeguards against discrimination. The 2011 Gender Index was applied in the form of surveys carried out at the request of Poland’s Ministry of Regional Development in the institutions involved in the implementation of the Human Capital Operational Programme. It was expanded to cover Poland’s state administration in 2012. The analysis conducted as a result of these surveys covered equal treatment with respect not only to gender, but also to age, disability, nationality, religion and sexual orientation. As this research was funded primarily by the European Social Fund, the findings are vital for preparing a broader and appropriately drafted policy pertaining to equal treatment and eradication of gender inequalities in the labour market and the workplace. Finally, on the basis of her original research, Lisowska presents a set of questions for consideration in the GEQ survey.

The second contribution in the final part of the WP1 was prepared by Beata Kowalska, Aleksandra Migalska and Marta Warat. Their article “Who Won the Polish Transformation? Gender Dimensions of Reforms in Poland” constitutes a crucial voice towards facilitating an understanding of the systemic transformation in Poland, with its numerous phenomena and processes, as well as the emergence of some fundamental social issues. The ongoing
Restructuring of the economy is, according to the authors, a local version of the Structural Adjustment Programmes (introduced by the World Bank and the International Monetary Fund), which brings on an array of consequences, twice as oppressive for women as for men. It manifests itself evidently in the fact that women lose employment in the gendered segments of the labour market. They are also deprived of the earlier privileges, such as several welfare state policy instruments, made available during the former era of the previous system, particularly with regard to access to the care infrastructure serving women with young children (kindergartens and nurseries). The authors underline that the responsibilities surrounding childcare are now bestowed exclusively on women. A growing number of services that earlier used to be provided by the state are now becoming privatised. It is these areas of deficits and inequalities that are identified in the article on the grounds of distinct data sources. According to Kowalska, Migalska and Warat, comprehension of gender inequality in the Polish context is impossible without understanding the neoliberal core of the state and its impact on the personal and public spheres. The consequences discussed and documented across the life spheres by the authors are, together with Lisowska’s argumentation, indicative of the long-view and long-term policies in terms of achieving gender equality, and more broadly, gender democracy in Poland.

The authors formulate a coherent concept called “backlash trinity”, which is manifested in the rudimentary areas of social life. They formulate a threefold set consisting of conservatives, populist nationalists and traditional religious institutions. These three pillars of operations cement some significant political, legal, social and cultural discriminatory consequences for women. In their ideological narratives, the conservatives promote restoration of the “natural” social order, to be implemented through policies and laws supportive of an essentialised sex/gender order. The persistent and strong populist-nationalist stream timelessly reinforces a clearly defined patriarchal sex/gender order, under which women, performing their roles as mothers and homemakers, are the repositories of the nation’s honour. During the post-transformation period, the Polish Catholic Church became involved in general politics and effected drastic policy changes in the field of human rights in general, and women’s reproductive rights in particular. The far-reaching influence of the conservatives is consolidated through the “from the pulpit” activity of the clergy, and illustrated by the Catholic media rhetoric in the fight for biological citizenship for foetuses.
(Korolczuk 2014). The female protector role over the unique heritage is underpinned by a divinely ordained sex/gender order. The authors argue that “[a]lthough religious authorities do not encourage hostility to the entire human rights canon, they are selective in their support of human rights’ principles based on religious doctrine. By no means does the backlash trinity’s opposition to gender equality result in [its] delegitimisation” in the areas of politics, legal regulations and culture.

Exemplifying the impact of neoliberal politics on the female workplace situation (a context also described by Lisowska in this volume) to illustrate women’s positioning, Kowalska, Migalska and Warat introduce the concept of the **victims of transformation**. One of the prominently featured consequences of neoliberalism entails emergence of the feminisation of poverty (destitution), paired with the restrictions in access to (childcare) resources and services mentioned earlier. A critical analysis is applied to women’s participation in politics and governance across various institutions, seen through the prism of the main levels of social world structures – micro, meso and macro.

Finally, the authors reflect on the main Polish development strategies outlined in the document “Future Perspectives Poland 2030 – Long-term Strategy of Developing Poland”. They disassemble and uncover the plans of the Polish government with regard to achieving gender equality, paying special attention to the key women’s issues. The devised strategic plans presented in the report are negatively evaluated, pointing to major deficits in the area of focus on women’s rights issues, including violence against women. The authors highlight the inherent systemic incapacities of the report, linked to its orientation to the neoliberal state’s development, which overlook the primary gender equality-related issues.

The concluding paper of WP1 is “**Critical Assessment of the Norwegian Study Gender Equality and Quality of Life (GEQL 2007)**” by Trine Rogg Korsvik. The article discusses those gender equality issues which relate to working life, civil society, and sexual harassment – these areas should all be seen as significantly impacting the direction that the survey research preparations in the GEQ project are taking. These dimensions are discussed in the light of the experiences collected during the period of the Norwegian “mother-project” – GEQL 2007. Therefore, the critical notes and arguments are based on the already completed Norwegian project, which remains an important reference point for GEQ. The article raises some important issues addressed in the Norwegian study, evaluating both their strengths and weaknesses.
The author enumerates the dimensions investigated in GEQL 2007 and the arguments for certain new aspects and topics that she believes should be included in future research. In essence, the Norwegian study covered six dimensions: GE orientation (attitudes), GE practices (action), gender formation, intra-couple resource distribution, GE in childhood/youth and the quality of life & health. Korsvik strongly argues on behalf of civil society participation being included as an additional area. This dimension should involve respondents’ engagement with various areas of society, e.g. in politics, community (neighbourhood) organisations, voluntary associations, labour unions, religious congregations, and so forth. The aim here is to understand the relations between the collective and the individual respondents’ sense of capacity for influencing society, as well as their own situation and sense of belonging and power(-lessness). Referring to the 2007 findings, the author underlines that taking into account the characteristics of the postmodern world (globalisation, neoliberal ideology impact, financial crisis, unemployment, and visibility of precariousness), the new study should pay special attention to the structural factors and their consequences for the certainly gendered working place cultures. The next GEQ survey could include more questions pertinent to the relations between workplaces and gender equality practices. Apart from the economic sphere, Korsvik looks at yet another topic examined in GEQL 2007 – violence, and more specifically sexual harassment. As shown in the earlier research, violence in both private and public spaces (such as streets, schools and workplaces) is a huge obstacle on the gender equality-oriented pathway. It has a pronounced negative effect on the health and quality of life, working life, as well as participation. Consequently, Korsvik strongly advocates expanding the future GEQ survey to include sexual harassment (physical and/or verbal unwanted sexual attention) and rape. She concludes that the IMAGES survey can constitute a good blueprint for investigation of these difficult topics.

Furthermore, Korsvik notes the significance of the link between gender equality and freedom of choice, which manifests itself in posing a question about the extent of one’s agreement (or disagreement) with the idea that neoliberal understanding of freedom of choice in the market and the concept of freedom to choose can be seen as gender-equal. She illuminates the need for statements distinguishing between gender equality and equal status (or gender equity). The topics debated by Korsvik were deemed as deserving particular consideration during the design phase of the GEQ survey, and were largely
debated among the members of the research team, as well as being taken into account in the preparation of specific research questionnaire sections.

The GEQ Research Team hopes that the project papers, as well as the upcoming tasks within the project, will theoretically and empirically enrich the research on gender equality, quality of life and social development. The next volume (currently under preparation) will be dedicated to policy analysis. This next step will help us identify the areas of potential improvement regarding GE as far as the policy area is concerned. The latter will later be necessary for formulating policy recommendations.

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