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Intersectionality in Action: learnings, challenges & recommendations from IDRC-supported research in the global South

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SYNTHESIS REPORT

Intersectionality in Action: learnings, challenges & recommendations from IDRC-supported research in the global South

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Acknowledgements

This report is the product of a collaborative initiative between the Southern Centre for Inequality Studies (SCIS) at the University of the Witwatersrand and Canada's International Development Research Centre (IDRC). The IDRC commissioned the project “Promoting Intersectional Development Research”, and SCIS designed and led the collection of data, analysis and synthesis.

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Executive summary

Project background

The call for integrating intersectionality into development research and practice has surged in recent years. Advocates consider it a crucial perspective for understanding the interconnected forms in which oppression manifests and is experienced by marginalised groups of people. This approach is seen as valuable in crafting targeted, context-specific policy interventions to address diverse social problems. Despite its growing prominence and alignment with social justice agendas, confusion persists about what intersectionality entails. Ongoing debates centre on its origins, purpose and distinctiveness when compared to other conceptual tools and transformative methodologies.

Existing intersectionality research often prioritises scholarship from the global North, particularly North America, which overlooks the diverse realities and perspectives of the global South. It is essential to highlight that intersectionality, as both a concept and a way of thinking, was present in various feminist traditions in the global South well before gaining prominence in the United States and academic discourse.

Given the lack of a precise definition for intersectionality, scholars and practitioners increasingly emphasise the importance of investigating its application in specific research contexts and practical applications. The collaborative initiative "Promoting Intersectional Development Research," led by the Southern Centre for Inequality Studies (SCIS) at the University of the Witwatersrand and Canada's International Development Research Centre (IDRC), has provided an opportunity to interrogate the concept of intersectionality and critically evaluate its relevance for development research in and for the global South.

The principal objective of this project is to “understand, inform and promote intersectional approaches to development research” across different programme initiatives of the IDRC. More specifically, the project aims to:

1. Document the diverse application of an intersectional approach in IDRC-supported research projects.
2. Synthesise the lessons on the benefits, limits and barriers of incorporating an intersectional approach into research, and identify opportunities and challenges for applying intersectionality to research dissemination, policy application and engagement.
3. Identify the needs for strengthening capacity among IDRC staff and partners to enhance understanding and facilitate practical learning about the application of an intersectional lens to development research.

To achieve these objectives, SCIS partnered with eight organisations to examine their application of intersectionality in an IDRC-supported research project. The resulting case studies demonstrate intersectionality in action, exploring how diverse researchers and practitioners apply its concepts and principles. These studies reflect on the relevance and usefulness of employing an intersectional lens within diverse contexts and projects that employ a range of epistemological and methodological approaches. They offer insights into both the alignment and tensions associated with adopting an intersectional lens.

Report aims and methodology

The report employs a cross-cutting comparative approach to distil key insights and learnings from the case studies.

Section 2 outlines the varied origins of intersectionality, encompassing its presence in the global South before its popularisation in the United States, along with associated critiques and concerns.

Section 3 details the project's method and approach, outlining the process of short-listing and selecting IDRC projects for case studies and the establishment of a learning community to support case-study write-up. It also addresses challenges and tensions encountered, particularly when some projects did not initially incorporate intersectionality into their design.

Section 4 outlines key learnings from applying an intersectional lens across various project contexts, thematic areas and disciplines. This section focuses on three key areas: (i) how the concept of intersectionality is understood, deployed and its specific value-add; (ii) how intersectionality concepts and principles manifest in practical research execution; and (iii) what intersectional praxis entails.
Several projects within this study adopt action research or participatory action research approaches that insist on a strong connection between research and social change. This connection, achieved through advocacy, interventions or movement-building efforts, enriches ongoing discussions about applying an intersectional lens.

Section 5 provides recommendations for strengthening the understanding and application of intersectionality in development research. These recommendations aim to prevent oversimplification, co-option or dilution of the term while fostering a nuanced and effective approach.

Intersectionality: A travelling concept

Intersectionality has emerged as a prominent aspect of scholarly work that addresses inequality, despite ongoing debates over its origins and definition. While the idea of interconnected forms of oppression is longstanding, especially in the global South, it has experienced a resurgence in recent decades and has evolved into a widely recognised and utilised concept worldwide.

Section 2 of this report explores two genealogies of intersectionality: one associated with black feminist movements in the United States, such as the Combahee River Collective, which emphasised interconnections between race, sex, gender and class, and the second rooted in global South feminisms in which race, gender, caste, class and nation are understood as mutually constitutive.

The importance of recognising the diverse origins and definitions of intersectionality are underscored, presenting this concept not only as a conceptual tool but also as a form of critical praxis. The report emphasises seeing intersectionality not as a stand-alone theory but as a versatile conceptual “tool” or “lens”. As a lens, intersectionality directs research attention to power differentials, particularly within social groups, and makes visible specific experiences of overlapping vulnerabilities.

However, caution is advised against imposing intersectionality to the detriment of other frameworks and approaches better suited to specific contexts. This emphasises the need to amplify

southern voices and perspectives. The report raises concerns about the potential depoliticisation of intersectionality with its mainstream acceptance, which poses a risk to its transformative potential.

Key learnings and insights

What is the value-add of intersectionality

The paramount value of an intersectional lens lies in its ability to shed light on the distinct ways in which individuals or groups experience forms of disadvantage or oppression.

The case studies consistently emphasise that incorporating an intersectional perspective into their research facilitated the recognition of differentiation within broadly categorised “disadvantaged”, “marginalised” or “vulnerable” groups. The incorporation also brought to light the specific interlinked vulnerabilities experienced by individuals and groups, which enabled more targeted and effective responses to the intricate challenges they faced.

It is noteworthy that certain case studies did not explicitly use the term intersectionality as theorised in academic discourse. Instead, they employed contextually embedded conceptual lenses offering similar insights. For example, Women in Informal Employment: Globalizing and Organizing (WIEGO) refined their research and advocacy approach over time, focusing on people’s position in the informal economy through a “disaggregated livelihoods approach” and a “segmentation and risk model”. Although not explicitly labelled as intersectional, this conceptual approach, developed through WIEGO's engagement with workers and membership organisations, sheds light on how "informal workers face multiple marginalisations that intersect to shape their varying degrees of vulnerability across multiple structures of the social system". The crucial point is that intersectional insights arise from researchers' extensive experience in their field and the formulation of questions inherently grounded in an understanding of complex contexts.

Translating intersectionality into methodological practices

There is no singular or preferred method of translating intersectionality into methodological practices.

The case studies highlight three guiding principles for obtaining intersectional insights in research:

Embed research in context

- An intersectional lens focuses on the power dynamics in specific spatial and temporal contexts in which marginalisation and privilege play out.
- Social categories (e.g. race, gender, caste) are seen as contextually contingent, not fixed.
- A commitment to participatory action research emphasises deep knowledge and local integration for research to lead to social change.
- This commitment also stresses the value of community proximity in comprehending diverse identities and categories, as elaborated in the subsequent section.

Scientific rigour and ethics in identifying social categories for analysis

- Identifying the relevant social categories is complex and is a context-dependent undertaking.
- It is not necessary or practical to consider every conceivable identity category and intersection. Instead, researchers pragmatically select prominent or pertinent forms of difference.
- Working closely with communities helps refine the scope of relevant social categories.

Embrace methodological plurality

- Various methodologies are valuable for unravelling interconnected forms of marginalisation at multiple analytical levels (i.e. micro, mezzo and macro).
- Qualitative methods dominate but are not necessarily required; choice depends on the study's context and goals.
- The case studies often employ mixed methodologies. However, this report cautions against suggesting a universally correct or appropriate method for intersectional inquiry.
- The goal is to ensure that the chosen methods yield intersectional insights.
- Intersectional quantitative methods are underdeveloped but can yield findings that drive transformative outcomes.

Intersectional praxis and social change

Intersectional praxis is driven by a commitment to document inequalities and action for social change.

The report details four elements of intersectional praxis that encompass both the research process and its application post-research in dissemination, engagement, advocacy, organising and movement building.

The research process itself as transformative

- The case studies illustrate that the demarcation between research and praxis is somewhat artificial.
- Elements perceived as constituting "praxis", such as knowledge co-production, affirm earlier activist traditions, such as participatory action research, which emphasises flattening hierarchies and validating diverse knowledge sources.

Research and action intertwined

- Case studies are based on organisations that consider research and action as interconnected.
- Organisational mandates involve research that informs advocacy, movement building, policy development and/or programming.

Co-production and flattening hierarchies

- Case studies emphasise co-production of knowledge and flattening hierarchies, which aligns with participatory action research traditions.

Building alliances and social movements

- Case studies demonstrate instances in which research deepened or created alliances between marginalised groups, communities, academics and policy makers.
- The notion is challenged that intersectionality hinders coalition building through "identity politics", but emphasises that differentiated experiences of inequalities can present tensions in organising efforts to build solidarity.

Disseminating practices for policy impact

- Research results are made accessible beyond academic publications and are tailored for varying educational levels and languages.
- Potential impacts on various individuals and organisations are assessed and knowledge is tailored for specific areas of action and influence.
- Research benefits participants in their social and political activities and it aids policy development, campaign building, organising, movement building and advocacy.

Next steps: Recommendations for the IDRC

Operationalising intersectionality in development research is challenging because it is more of a lens than a rigid approach.

There is no one-size-fits-all approach and its integration into international organisations carries the risk of reducing it to a check box that compromises its transformative potential.

Practical guidance and capacity building are crucial, but the IDRC must navigate a nuanced approach that aligns its incorporation of intersectionality with its goals and existing frameworks.

Viewing this as a learning journey, the IDRC should balance experimentation with caution to prevent misinterpretation, co-option or dilution of intersectionality. Collaborating with global South partners is imperative for ensuring meaningful application.

As the IDRC deepens its engagement with intersectionality, this report recommends a comprehensive approach that should involve the following:

- ***Conceptual clarity:*** Strive for clear definitions and consistent use of the term intersectionality while recognising the diversity in how it is defined, adopted and applied.

- ***Integration into existing frameworks:*** Collaboratively work with partners to incorporate intersectionality into existing tools and frameworks.

- ***Tailored resources*****:** Develop subject-specific, programme-aligned and context-appropriate resources to build research capacity and safeguard against a formulaic approach. It is crucial to amplify southern perspectives and establish peer learning opportunities and partnerships.

- ***Intersectionality in grant-making practices:*** Resist the uncritical adoption of intersectionality and scrutinise its implications for internal processes and power dynamics. The IDRC should consider developing *principles* for integration throughout the grant-making cycle that emphasise local context, flexibility and a commitment to addressing systematic inequalities.

Conclusion

The community of researchers, practitioners and advocates embracing intersectionality in development research is expanding rapidly, despite a lack of clear guidance and dedicated resources.

There is a pressing need to enhance understanding and awareness of intersectionality; organisations rooted in local contexts are well-positioned to lead this effort.

Our hope is that the insights presented in this report will drive the conversation forward, prompt enhancements in research, organisational practices and grant-making and ultimately contribute to the advancement of a more equal world.

Acronyms

AJWS	American Jewish World Service
CEHAT	Centre for Enquiry into Health and Allied Themes
CFUG	Community Forestry User Groups
GTA	Gender Transformative Approach
ICARS	International Centre for Antimicrobial Resistance Solutions
IDRC	International Development Research Centre
SCIS	Southern Centre for Inequality Studies
SGBV	Sexual and gender-based violence
SSWH	Society for the Study of Women's Health
STEM	Science, Technology, Engineering and Mathematics
WIEGO	Women in Informal Employment: Globalizing and Organizing
WMC	Women Media Collective

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1. Introduction

The call to adopt intersectionality in development research and practice has gained momentum in recent years. Advocates consider it a crucial perspective for understanding the interconnected forms in which oppression manifests and is experienced by marginalised groups of people. This approach is also perceived as valuable for creating targeted and context-specific policy interventions to address diverse social problems. Despite its growing prominence and alignment with social justice agendas, there is still a great deal of confusion over what intersectionality is. Furthermore, there is ongoing debate about its origins, purpose and distinctiveness when compared to other conceptual tools and transformative methodologies and approaches.

> *"Intersectionality is a lens through which you can see where power comes and collides, where it interlocks and intersects. It's not simply that there's a race problem here, a gender problem here, and a class or LBGTQ problem there. Many times that framework erases what happens to people who are subject to all of these things."*
>
> Kimberlé Crenshaw in CLS, 2017

Existing intersectionality research tends to favour scholarship from the global North, particularly North America, which neglects the diverse realities and perspectives of the global South. It is crucial to emphasise that intersectionality – as a concept and a way of thinking – was present in various feminist traditions and theorisations well before it gained prominence in Western academic discourse. This is because the social, political and economic conditions in the global South have always demanded more nuanced analyses than the Eurocentric frameworks that have traditionally dominated social science research (WIEGO case study report: 5).

Given that intersectionality lacks a precise definition, scholars and practitioners increasingly stress the importance of investigating the application of intersectionality to specific research contexts and practical applications. Harris and Patton (2019: 348) argue that "clarity about what intersectionality can do will not arise from debating about the theory", but rather from examining "how intersectionality has already been done in order to address what it should and can do". Kimberlé Crenshaw (2011: 22), widely regarded as having coined the term, echoes this sentiment, stating, "I've consistently learned more from what scholars and activists have done with intersectionality than from what others have speculated about its appeal".

The collaborative initiative "Promoting Intersectional Development Research", led by the Southern Centre for Inequality Studies (SCIS) at the University of the Witwatersrand and Canada's International Development Research Centre (IDRC), has provided an opportunity to interrogate the concept of intersectionality and critically evaluate its relevance for development research in and for the global South.

The principal objective of this project is to understand, inform and promote intersectional approaches to development research across different programme initiatives of the IDRC. More specifically, the project aims to:

1. Document the diverse application of an intersectional approach in IDRC-supported research projects.
2. Synthesise the lessons on the benefits, limits and barriers of incorporating an intersectional approach to research and identify opportunities and challenges for applying intersectionality to research dissemination, policy application and engagement.

3. Identify the needs for strengthening capacity among IDRC staff and partners to enhance understanding and facilitate practical learning about the application of an intersectional lens to development research.

To achieve these objectives, SCIS collaborated with eight organisations (see Table 1) to address a range of issues, including informal work, gender-based violence, online hate speech, maternal health, violent extremism and women's empowerment in diverse geographic locations in the global South. These organisations were tasked with reflecting on their engagement with intersectionality within a specific IDRC-supported research project.

This initiative distinguishes itself by showcasing intersectionality in action by examining how diverse researchers and practitioners apply intersectionality concepts and principles in research and praxis. Each organisation contributed a case study report that reflected on the relevance and usefulness of an intersectional lens in their specific context and, in some cases, the extent to which their work could be deemed intersectional even if it was not labelled as such. The case studies employed various epistemological and methodological approaches that shed light on both alignment and tensions with an intersectional lens.

What sets these research projects apart, and also makes this project a unique contribution to broader debates on the application of intersectionality, is these organisations' longstanding commitment to not only generate knowledge but also drive positive social change. Many projects adopt action research or participatory action research approaches that emphasise the co-production of knowledge with those directly affected. This strong connection between research and social change, achieved through advocacy, interventions or movement-building efforts, contributes crucial perspectives to the ongoing debates surrounding intersectionality and its application in development research.

This report does not aim to summarise individual case study reports or recommend a specific approach to applying intersectionality. Instead, it employs a cross-cutting comparative approach to distil key insights and learnings from the case studies. This entails exploring how intersectionality is comprehended and applied across diverse project contexts, thematic areas and disciplinary foci. The report positions the findings and insights within ongoing debates about intersectionality and its translation into research methodologies and praxis. Lastly, it identifies critical gaps and challenges in applying an intersectional lens and generates recommendations on how the IDRC can strengthen its own and its research partners' understanding and application of intersectionality. These recommendations aim to safeguard against the oversimplification, co-option or dilution of the term while fostering a nuanced and effective approach.

1.1 Outline of the report

The report is structured as follows:

The **second section** discusses the diverse origins and objectives of intersectionality. This reflection looks at intersectionality's applicability as both a conceptual tool and critical praxis, while also discussing some of the challenges and critiques surrounding the terms mainstream adoption, expansion and application.

The **third section** discusses the project's method and approach, detailing the process of short-listing and selecting IDRC projects for case studies. It also addresses some of the challenges and tensions

we encountered, particularly as some projects did not incorporate intersectionality in their initial design and conceptualisation.

The **fourth section** provides an analysis of the cross-cutting learnings and insights derived from the application of an intersectional lens in the eight case studies. The discussion is organised into three key areas. First, it explores how the studies comprehend and deploy the concept of intersectionality and its specific value-add in relation to alternative concepts and approaches used alongside or in lieu of intersectionality. Second, it delves into how intersectionality concepts and principles manifest in the practical execution of research, including design, data collection and analysis. Third, it explores what an intersectional approach to praxis entails, focusing on how the studies conduct research and transform intersectional insights into concrete interventions and actions geared towards fostering social change.

The **fifth section** presents recommendations for the IDRC based on insights derived from the case studies and the collective learning gained through this work.

2. Intersectionality: A travelling concept

The concept of intersectionality has gained traction in development research, particularly in the study of inequality, power and marginalisation. It offers a framework for understanding the interconnected ways in which oppression and marginalisation manifest and impact specific groups of people. While the idea of interconnected forms of oppression is longstanding, especially in the global South, it has been revitalised in recent decades through the discourse of intersectionality (Hassim, 2023).

Although commonly associated with Black[1] feminist movements in the United States during the 1970s and early 1980s, intersectionality has diverse origins in the global South, predating its popularisation in the United States. The term has evolved into a widely used and recognised concept in diverse parts of the world. It has become a "travelling concept" (Salem, 2018) that introduces new perspectives and urgency to discussions about inequality.

This section of the paper seeks to outline the diverse origins and objectives of intersectionality, and the critiques and concerns surrounding it.

2.1 Where does the term come from?

The concept of intersectionality has multiple genealogies in Black feminism, both in the United States (Nash 2019, 6–7), where movements such as the Combahee River Collective highlighted the interconnections between race, sex, gender and class, and in the global South where race, gender, caste, class and nation were all understood as mutually constitutive. This section offers a concise overview of the two trajectories outlined by Shireen Hassim[2]: the first linked to the Black feminist

[1] There is much debate about capitalising the word "Black" when referring to the racial group. Southern African scholars have historically not capitalised "Black" in opposition to the apartheid capitalisation of "Native", "Bantu" and then "Black". Black Consciousness movements on the other hand capitalised "Black", but used it to mean a shared condition of oppression and not a racial identity. While acknowledging that this is an ongoing scholarly debate, we have chosen to capitalise "Black" to signal that racial identities are not natural categories but are socially and historically produced.

[2] This section extensively relies on a commissioned paper by Professor Shireen Hassim (2023) titled "Everything, everywhere, all at once?: Genealogies, trajectories, and futures of Intersectionality".

movement in the United States and the second rooted in intersectional perspectives within global South feminisms.

2.1.1 Trajectory 1: Black feminist movement in the United States

In contemporary discussions, the concept of intersectionality is most frequently attributed to Kimberlé Crenshaw, a Black feminist legal scholar in the United States (US). Crenshaw gained prominence through her critique of a specific legal regime in which sex discrimination and race discrimination were treated as separate issues. Crenshaw coined the term intersectionality as a conceptual tool to illuminate the legal system's inadequacy in addressing cases involving both race and gender discrimination.

Crenshaw initially laid out her concept of intersectionality in a (1989) paper focused on the case of *DeGraffenreid v General Motors*, in which African-American women were denied access to better jobs within the company. Crenshaw argues in her paper that by categorising African-American women solely as women or solely as Black, the courts overlooked the unique challenges Black women faced as a group. Crenshaw emphasised how race and gender identities intersected to shape the distinct experiences of discrimination faced by Black women (Crenshaw, 1991). Her work drew significant inspiration from the challenges faced by Black feminists striving for recognition within predominantly White women's rights movements and seeking acknowledgement of the intersection of gender within Black liberation movements. The term should therefore not be seen purely in theoretical terms, but as a form of praxis – a means of giving language to specific forms of injustice as well as shaping how the law and social policies might be written to be more inclusive.

A key contribution of Crenshaw's concept of intersectionality is the way it draws attention to power, especially power within social groupings. She sees intersectionality as "a lens through which you can see where power comes and collides, where it interlocks and intersects" (CLS, 2017). The value of using intersectionality as a lens lies in its ability to illustrate the place at which inequalities intersect and, consequently, how power works in a given society. It reveals the presence of multiple axes of discrimination and the need to address them collectively rather than treating them in isolation.

2.1.2 Trajectory 2: Global South feminisms

Intersectionality in the global South has unique historical roots that stem from interconnected struggles against multiple forms of dominance. Global South feminisms have consistently embraced intersectional thinking, engaging in complex analyses of how colonialism, patriarchy, racism, nationalism and neoliberal capitalism, both individually and in combination, shape their realities. This necessity arises from the fact that feminism in these regions evolved concurrently with, and was influenced by, anti-colonial, anti-racist and anti-caste movements, among other influences. These social and political movements challenged diverse forms of oppression and advocated social justice on multiple fronts. In India, for instance, the non-Brahman movements of the early 1900s and the rise of Dalit movements in the 1960s, which actively opposed caste-based discrimination and a hierarchical social order, have long shaped feminist theorising (Menon, 2015; Velayudhan, 2018; see also IT for Change case study).

> *"The presumed subject of feminist politics has [long] been destabilised in India most notably by the politics of caste, religious community identity and sexuality"*
>
> Menon, 2015: 38

In Brazil, Lélia Gonzalez, now considered one of the foremost intellectuals of Afro-Brazilian feminisms, played an active role in the Brazilian Black anti-racist movements of the 1970s and 1980s during the military dictatorship. In her activism and writings on the role of Black women within the Black movement and Brazilian culture and society, she insisted on the need to "always think race, class, and gender in relation" (Barreto, 2020: 15). Today, Gonzalez is acknowledged as an original thinker and an early practitioner of a "locally rooted intersectionality", even though she did not use that specific term (Internet Lab case study: 11).

Women's movements in the global South, as Nivedita Menon (2015: 38) argues, "never started with the idea of some subtract Woman that they later needed to complicate with more and more layers. This identity of Woman was from the start located within national and within communities of different sorts". The point is that the "single axis framework" was never generally accepted or unchallenged in the global South, which led to the emergence of diverse forms of feminism.

Over time, feminists have grappled with what differences matter and why, and how these constitute the grounds for theorising and organising in evolving political landscapes. These inquiries have provided crucial insights that contribute to the contemporary understanding of intersectionality. The increased involvement of feminists from the global South in international debates, especially at the United Nations, has been pivotal in shaping new theoretical perspectives (see Box 1).

Box 1: Southern feminists impact on global agenda

Since the 1980s, postcolonial feminists have advocated the treatment of gender and sexuality as structuring variables in their own right. They challenged the view that gender and sexuality are mere by-products of colonialism and capitalism.

This was evident at the United Nations' Decade for Women conferences in Mexico and Nairobi, where there were calls for attention to capitalism and unequal global power to be considered as also shaping the ways in which gender inequalities were experienced, perpetuated and struggled against.

At the Beijing Conference in 1996, southern-based activists had significantly influenced the global agenda for women's rights. The Beijing Platform for Action highlighted the interconnectedness of class, religion, culture and political access in shaping gender inequalities.

Source: Hassim, 2023:5-6

Subsequent analyses, including critiques of liberal feminism and postcolonial and queer feminist perspectives (Menon, 2015; Mohanty, 1991), have significantly advanced our comprehension of intersectionality. Notably, these analyses exposed the fallacy of generalising about women, particularly when relying on the experiences of privileged urban Western women. They also challenged essentialist binaries, underscored the fluidity of identities and subjects, shaped by other categories such as caste, religion, creed and nation, and illustrated how gender organises, and is shaped by, other cultural forms.

There are noteworthy parallels in the "language and explanations" of the Black feminist movement in the US and feminisms in the global South, such as Dalit feminisms or Afro-Brazilian feminisms, revealing "their common conceptual foundations", as identified by Shreya Atrey (2019: 64). However, the genealogies of intersectionality originating in the global South often remain obscured amid the current resurgence and widespread adoption of the term.

2.2 Defining and operationalising intersectionality

Intersectionality has emerged as a prominent aspect of scholarly work that addresses issues of inequality and marginality, despite ongoing debates over its exact definition. The focal point of these discussions centres on the nature of intersectionality, which prompts questions about whether it primarily functions as a theory, conceptual tool, method, ethical stance, a form of praxis or, perhaps, a combination of these elements. Within the context of these debates, scholarly attention has been placed on determining how to operationalise intersectionality effectively in both research and praxis.

The case study reports underscore the importance of viewing intersectionality *not* as a stand-alone theory or even a theoretical framework but rather as a versatile conceptual "tool" or "lens" that can be applied to various social issues and contexts. Keeping this perspective in mind, this section provides a brief overview of key scholarship that has refined earlier conceptualisations of intersectionality and has offered tools for operationalising it in research and praxis. Its value as a conceptual tool for research and as a form of critical praxis is further elaborated in Section 4 when discussing the case studies.

There are many elaborations of intersectionality as a concept and theory. Especially prominent is sociologist Patricia Hill Collins who has argued that intersectionality functions as a metaphor and a heuristic that together provide "a conceptual foundation for intersectionality's heterogeneous practices" (Collins et al., 2021: 693). Collins coined the concept "matrix of domination" to understand the experiences of Black women in the US who occupy a distinctive position at the intersection of two major systems of inequality – race and gender (Collins, 1990). The matrix that operates to sustain a status quo of inequality is composed of four domains of power: structural, cultural, disciplinary and interpersonal (see Box 2). Collins references Crenshaw's concept of

Box 2: Patricia Hill Collins' "matrix of domination"

This framework introduced four distinctive yet interconnected domains of power:

- *Structural domain of power* refers to the fundamental power contained in the structures of social institutions, such as the labour market, education and health.
- *Cultural domain of power* refers to the dominant perceptions and/or expectations of a given society regarding particular social problems.
- *Disciplinary domain of power* refers to the way in which rules and regulations are applied, which determines people's inclusion or marginalisation within a given social structure.
- *Interpersonal domain of power* refers to how people's experiences with multiple forms of power shape their intersecting identities and vulnerabilities to various forms of oppression in society.

Source: Collins, 1990, as discussed in the WIEGO case study (pg 8)

intersectionality and relates it to the matrix of domination: "the term matrix of domination describes this overall social organisation within which intersecting oppressions originate, develop, and are contained" (Collins, 1990).

A matrix conveys the idea of “interlocking systems rather than a cumulative hierarchy”. Collins is careful not to suggest that there is a singular and authentic subject position. “The matrix interlocks in dynamic ways; as each axis/domain of power encounters internal changes, the matrix rearranges itself so that the overall status quo is maintained” (Hassim, 2023: 8).

This idea was taken up further in Collins’ later work that shows how the idea of intersectionality could be operationalised by researchers. Collins and Bilge (2016) identify six ideas that are core to a theory of intersectionality: *inequality, relationality, power, social context, complexity and social justice.* These wide-ranging domains overlap with one another and with other branches of complexity theory. In taking the framework further to create a more elegant account, Misra et al (2021) propose combining inequality, power and social justice into one concept, *oppression*, which they then link to *relationality*. *Complexity* and *context* index the social and experiential aspects of inequality. They add to the list *comparison*, which they deem to be a key sociological method – it is of course also to be found in other social sciences – and *deconstruction*, a method to destabilise categorical differences.

Misra et al (2021) advocate treating intersectionality as a methodological intervention. They demonstrate the benefits of applying these tenets in various methodological approaches to examine the impact of power, inequality and social context on individuals' experiences. They emphasise the importance of engaging with social context and discerning when and where specific forms of difference matter the most. While they link intersectional theorising, epistemology and methodological choices, their exploration falls short of presenting an overarching theory distinct from other theories of complexity in the social sciences (Hassim, 2023). The methodological tenets primarily affirm existing methodological debates that favour context-driven research using methods open to multifactorial analysis.

This raises questions about the distinctiveness of intersectionality, something we discuss in Section 4 through the case studies. It also highlights the need for caution in not imposing intersectionality at the expense of other frameworks and approaches that may be better suited or grounded in specific contexts. Another concern lies in the potential depoliticisation of intersectionality as it gains mainstream acceptance and potentially compromises its transformative potential.

Despite these concerns, intersectionality appears to be gaining increasing appeal and use in the global South. This may be attributed to its pervasive presence, often in implicit forms and predating the widespread use of the term. Another contributing factor is perhaps its emphasis not only on comprehending systems of power and oppression but also on actively transforming them. Collins and Bilge (2016) describe the pursuit of a fair and more equitable society as being at the heart of all intersectional research and praxis. This again points to the importance of seeing intersectionality as not only a conceptual tool but also a form of praxis. Collins and Bilge (2016: 32) reject the “scholar–activist divide” and argue that intersectional praxis sees knowledge and practice as intricately linked and mutually informing.

Given that social change is a primary driver of intersectional research, many elements perceived as constituting “praxis” within this framework closely align with earlier activist research traditions, such as participatory action research and feminist methods and approaches. These traditions

integrate principles of self-reflection, positionality and power dynamics within the research process. However, they also underscore knowledge co-production that contributes to addressing complex social challenges, recognises the validity of multiple forms of knowledge and gives voice to those seldom-heard as a form of power from below (WIEGO case study: 12–13).

2.3 Critiques and contestation

As intersectionality has gained mainstream traction, particularly through adoption by global development organisations such as the United Nations (Yuval-Davis, 2006), several critiques and concerns have surfaced regarding its relevance and usefulness. This is especially notable among scholars and activists in the global South. Indian feminist Nivedita Menon (2015) stands as a prominent critic who rejects the Western-derived concept of intersectionality. Menon (2015) views intersectionality as a form of conceptual imperialism that displaces non-Western or southern perspectives. She argues that the concept, uncritically pushed by international funding agencies, does not significantly contribute to understanding feminist issues and struggles in India and strongly risks depoliticisation. Mary John (2015: 72) in her response to Menon, and in defence of the concept of intersectionality, notes that there is "something quite paradoxical about an idea from a marginal location like Black feminism in the US, designed to tackle the challenges of theorising and advancing the political struggles of Black women, turning into a tool of power".

As intersectionality becomes integrated into organisational frameworks, there is a risk not only of oversimplification – reducing it to a checkbox or checklist – but also of it losing its radical and transformative potential. This concern is echoed in the WIEGO case study, which describes this phenomenon as "neoliberalism's capacity to co-opt emancipatory discourse" (WIEGO case study: 28).

Another widespread concern is that intersectionality is often focused on recognising and representing identities rather than understanding and addressing unequal power relations as the concept originally intended (Menon, 2015; Salem, 2018). This emphasis on identities over material and structural inequalities raises fears of "fracturing resistance to capitalism", as the IT for Change case study puts it, and diluting the political and activist origins of intersectionality.

In certain institutional contexts, intersectionality has been "appropriated and used weakly as a stand-in for liberal projects of diversity" (Hassim, 2023: 11). This appropriation risks relying on essentialist assumptions and thus potentially solidifying identity boundaries instead of opening them up. Leslie McCall (2005) proposes a way forward by advocating provisional and relational use of social categories, an approach echoed in Misra et al.'s (2021) "methodological tenets". Instead of defining or representing social groups, the focus should be on the "relationships among social groups and, importantly, how they are changing, rather than with the definition or representation of such groups per se" (McCall, 2005: 1785). This approach maintains a focus on unequal power relations.

A major concern regarding the adoption of intersectionality in the global South is its potential for non-contextual application that leads to an ahistorical or depoliticised analysis, a point highlighted by Nivedita Menon (2015). While it is true that various social differences, such as race, caste, class and gender, are always historically and contextually specific, Banerjee and Ghosh (2018) argue that rather than outright rejection, awareness of the concepts' diverse origins and contextual specificities should encourage a more reflexive use of intersectionality as a conceptual tool. This approach has the potential to understand and address the multi-dimensionality of inequalities and

marginality in specific contexts. Mary John (2015) suggests viewing it less as a theory and more as a prompt to researchers and activists to consider all dimensions of a problem and solutions to it. This perspective aligns with the findings and insights of the case studies, which consistently emphasise that intersectionality's contribution lies in making specific experiences of overlapping vulnerabilities visible and directing attention to power differentials, especially within social groups.

3. Project method and approach

This section outlines the project's method and approach, detailing the process of short-listing and selecting IDRC projects for case studies. It also addresses some of the challenges and tensions we encountered, particularly as some projects did not incorporate intersectionality in their initial design and conceptualisation.

The project initially comprised three distinct phases in which a network of researchers and practitioners was established to document the diverse engagement with intersectionality concepts and principles in IDRC-supported research studies, even if not explicitly labelled as such. An extra phase has been incorporated for 2024, providing sufficient time for effective dissemination and knowledge sharing within and beyond the IDRC.

3.1 Phase 1: Develop the selection criteria and terms of reference for case studies (January–March 2023)

In collaboration with the IDRC, the SCIS team, in its initial phase, worked on establishing criteria for selecting case studies from IDRC-supported research projects. This involved conducting a thorough review of intersectionality research and practical intersectional “toolkits” developed by international organisations, NGOs and other relevant entities.

While we noted how frequently the term intersectionality was mentioned in project documents, especially proposals, it was apparent that this metric did not accurately reflect the depth of integration of an intersectional perspective within the projects. Consequently, our evaluation did not hinge on the explicit use of the term or a specific conceptualisation of intersectionality. Instead, we gauged the degree to which projects embraced “intersectional thinking” in framing questions, making methodological choices and disseminating their findings.

The ultimate criteria employed for project evaluation encompassed the following aspects:

- **Project stage:** Projects were considered eligible only if they were either completed or in an advanced stage of development.
- **Diversity criteria:**
  - *Geographical representation:* Ensuring a diverse representation of regions and countries.
  - *Thematic focus:* Encompassing various IDRC focus areas: climate/food, health, education, science and technology, inclusive governance and inclusive economies.
  - *Methodological approach:* Including both qualitative and quantitative data collection and analysis methods.
- **Application of an intersectional lens:** The application of an intersectional lens, even if not explicitly labelled as such, was evaluated across three dimensions:
  - *Framing of the research "problem" or question:* To what extent does the research problem (i) recognise social categories such as gender or race as heterogeneous and intersecting with

other social categories and (ii) understand the context as structured by intersecting systems and structures of power.

- *Execution of the research:* Including considerations of research design, methodology and data analysis, assessing (i) the identity markers explored; (ii) the systems of oppression and/or privilege studied; (iii) whether it accounts for micro and macro levels; and (iv) the extent to which findings are analysed through an intersectional framework.
- *Dissemination and practical application of research:* Encompassing (i) strategies for making knowledge accessible and usable to diverse groups; (ii) acknowledging the perspectives of those most directly affected by an issue and ensuring the research is useful for their purposes; and (iii) ensuring organising and advocacy efforts transcend single-axis concerns.

The next step involved assessing 18 IDRC-supported projects selected by IDRC project officers based on the aforementioned criteria. This assessment included a thorough review of project documents (proposals, interim and final reports) and discussions with IDRC project officers.

Eight projects emerged as strong case studies. The evaluation process, including the final selection, was conducted in close consultation with Arjan de Haan (Senior Programme Specialist in Climate Resilience at the IDRC). Subsequent meetings were held with the relevant IDRC project officers to discuss the shortlisted projects. Upon receiving endorsements from the respective project officers, discussions were initiated with the project leaders of the selected projects. All eight research projects and organisations approached agreed to participate in the project, as detailed in the Table 1 below.

Table 1: IDRC-supported projects that contributed case study reports

Project number	Organisation(s)	IDRC-supported project	Country	IDRC focus areas
109580	IT for Change	A research project to combat gender-based hate speech against women in India	India	Inclusive governance
109580	Internet Lab	A research project to combat gender-based hate speech against women in Brazil	Brazil	Inclusive governance
109806	Society for the Study of Women's Health (SSWH)	Shifting Gender Norms for Improved Maternal and Adolescent Health in The Gambia and Ghana	Gambia and Ghana	Health
109087	American University of Beirut (AUB)	Reproductive rights in times of conflict: A qualitative exploratory study of the lived experiences of GBV among Syrian refugee women in Lebanon	Lebanon	Health

109070	American Jewish World Service (AJWS) and Centre for Enquiry into Health and Allied Themes (CEHAT)	Pathways to gender transformative change: Using evidence towards effective public systems to address gender-based violence in India	India	Health
109231	Women and Media Collective (WMC)	Women's agency and the gendered impact of violent extremism in Sri Lanka, Indonesia and India	Sri Lanka, Indonesia, India	Inclusive governance
109846	Women in Informal Employment: Globalizing and Organizing (WIEGO)	Informal workers and COVID-19: Evidence-based responses to the crisis at the base of the economic pyramid	Ghana, Senegal, South Africa, Tanzania, Mexico, Thailand, India	Inclusive economies
GLOW Nepal	ForestAction Nepal	Economic empowerment of women through forest solutions	Nepal	Climate and food and inclusive economies

In this phase we also developed terms of reference (ToR) for the case study reports (refer to Appendix 3). These ToR outlined the expected format and content of the reports.

Throughout the selection process, several key learnings emerged:

- The explicit use of intersectionality was limited.
- There were instances in which projects, without explicitly using the term, applied elements of an intersectional lens, while others using the term did not necessarily consistently operationalise intersectionality in the research process.
- Much like "gender fade" where integration of a gender lens in research does not consistently carry through all aspects of implementation and analysis, the application of an intersectional lens varied across different stages of the research.
- Projects often incorporated other conceptual frameworks (i.e. a feminist political ecology lens, gender transformative approach, a socio-ecological model) alongside or in lieu of an intersectional approach, highlighting the need to unpack the similarities and differences.
- Many of the selected projects fall under the category of action research or participatory action research, indicating a strong link between research and social change. This offers an opportunity for critical reflection on the linkages between intersectionality as a form of praxis and other transformative approaches and methodologies.

3.2 Phase 2: Establish learning community to support case study write-up (April–September 2023)

In phase two, the SCIS team recognised the importance of fostering dialogical space for peer learning and open discussion on intersectionality and its application. Over six months, monthly online roundtables were conducted with case study authors to guide the write-up process,

encourage mutual learning and facilitate debate on different perspectives and critiques of intersectionality. The first three sessions focused on specific readings covering intersectionality as a concept, method and praxis, while the last three provided opportunities for researchers to share their draft case studies and receive feedback.

These sessions helped consolidate insights, including doubts, criticisms and apprehensions about intersectionality. Further, the discussions highlighted the challenges associated with retrofitting intersectionality into projects that were not initially designed or conceptualised with the concept or lens in mind. This realisation underscored the importance of critically reflecting on the alignment and tensions between intersectionality and other approaches and methodologies. It also emphasised the need to avoid imposing intersectionality at the expense of other valuable perspectives and methodologies.

The monthly sessions played a crucial role in not only maintaining momentum and offering additional support but also ensuring that the value of participating in the project extended beyond report writing. Positive feedback from participants emphasised the importance of peer learning opportunities and partnerships and the importance of amplifying southern voices and perspectives (something we now feel more equipped to do).

3.3 Phase 3: Finalise case study reports and synthesise key learnings (October–December 2023)

In phase three, the SCIS team collaborated closely with the authors to refine and finalise the case studies. The case study reports underwent review by the SCIS team and IDRC colleagues (Arjan de Haan and Chaitali Sinha (Senior Programme Specialist in Global Health)), with consolidated feedback provided. The titles of the final case studies are listed in Table 2 below. With the support of Professor Shireen Hassim and Dr Ingrid Lynch[3], we used a cross-cutting comparative approach to distil key learnings and insights on the application of an intersectional lens. This synthesis report is the culmination of a collective process and workshop designed to identify important lessons on the benefits, limits and obstacles of incorporating an intersectional lens into development research.

Table 2: Title of case study reports

Organisation(s)	Case study title	Case study authors
IT for Change	Intersectional Frames in Digitalisation Research: Revisiting a Study by IT for Change About Misogynistic Trolling Online	Anita Gurumurthy, Malavika Rajkumar and Merrin Muhammed Ashraf
Internet Lab	Outcomes and Challenges in adopting Intersectionality as a Method at InternetLab: considerations for research and practice	Mariana Valente and Fernanda K. Martins

[3] The project appointed Professor Shireen Hassim and Dr Ingrid Lynch to help synthesise the evidence generated in the case studies. They each authored papers and actively contributed to an online workshop where we distilled and debated many of the key learnings and insights presented in this report.

Society for the Study of Women's Health (SSWH)	Applying an intersectional lens to understand the social determinants of maternal health in The Gambia: Insights from the SIMAH Project	Mat Lowe, Fatou Kinneh Ceesay and Priscilla Nyaab
American University of Beirut (AUB)	Navigating Intersectional Realities: On Syrian Refugee Women's Sexual and Reproductive Health and Rights in Lebanon	Sohayla El-Fakahany, Emile Whaibeh, Lina Abou Habib and Faysal El-Kak
Centre for Enquiry into Health and Allied Themes (CEHAT) and American Jewish World Service (AJWS)	Using an intersectional lens to build stronger evidence and action at the grassroots level in India to build a comprehensive response to Sexual and Gender-Based Violence	Sanjida Arora, Sangeeta Rege and Margo Mullinax
Women and Media Collective (WMC)	Undoing "Violent Extremism": a three country collaborative research study by the Women and Media Collective foregrounding the need for a more complex analysis of women's experiences of political violence	Farzana Haniffa, Kumi Samuel, Kamala Chandrakirana, Sarala Emmanuel & Ponni Arasu
Women in Informal Employment: Globalizing and Organizing (WIEGO)	Interrogating Intersectionality: Considerations on Critical Inquiry and Praxis for WIEGO's Actionable Research	Ana Carolina Ogando, Siviwe Mhlana, & Mike Rogan
ForestAction Nepal	Intersectional research for women's economic empowerment through Forest Solutions in Nepal	Srijana Baral & Kanchan Lama

3.4 Phase 4: Dissemination and knowledge sharing (January–October 2024)

The fourth phase of the project focuses on creating dialogical space to foster understanding, encourage debate and facilitate practical learning about the application of an intersectional lens within and beyond the IDRC.

The objectives for this phase are as follows:

- **Disseminating research and influencing policymaking:**
  - Publish case study reports and a synthesis report.
  - Develop blog posts and other accessible media for disseminating research findings and influencing policymaking.
- **Facilitating knowledge sharing within and beyond IDRC:**
  - Host a SCIS/IDRC panel on "intersectionality" at the IHD Global Conclave in Delhi in January 2024.
  - Participate in the IDRC learning event in January 2024 and other relevant meetings.
  - Host an online learning series between March and May 2024.

- Present at local and international conferences.

- **Establishing guiding *principles* for effectively integrating intersectionality in research and grant-making:**
  - Develop *principles* for integrating intersectionality in grant-making and/or a *framework* for developing tailored resources to apply intersectionality in development research and policy. Format and objectives to be determined in consultation with IDRC.

4. Cross-cutting learnings and insights

There is no rigid blueprint for operationalising intersectionality in development research. However, an intersectional lens has implications for every stage of the research process, encompassing research design, data collection and analysis, as well as post-research activities such as dissemination, engagement and policy application.

This section discusses the cross-cutting learnings and insights from the application of an intersectional lens in research and praxis across eight case studies. The discussion is organised into three key areas. First, it explores how the studies comprehend and deploy the concept of intersectionality and its specific value-add in relation to alternative concepts and approaches used alongside or in lieu of intersectionality. Second, it delves into how intersectionality concepts and principles manifest in the practical execution of research methodologies, including design, data collection and analysis. Third, it explores what an intersectional approach to praxis entails, focusing on how the studies conduct research and transform intersectional insights into concrete interventions and actions geared towards fostering social change.

4.1 What is intersectionality and why does it matter?

Intersectionality is a conceptual tool that directs researchers to examine how intersecting forms of marginalisation contribute to individuals' distinct vulnerabilities within a given system or society. The case studies emphasise this vital dimension, with multiple authors emphasising it as a distinguishing factor that sets the intersectional lens apart from other research methodologies. This approach enables a comprehensive understanding of injustices and inequalities by considering the interconnected forms of domination at work in specific situations and contexts.

Many of the case studies used approaches that, while not explicitly framed as intersectional, share common theoretical principles and research practices. For instance, there are overlaps in terms of embedding research in context (e.g. the socio-ecological model used by Society for the Study of Women's Health, henceforth SSWH), interrogating power dynamics in the research process (e.g. participatory action research in the ForestAction and Syrian refugee projects) and centralising participants' voices and concerns (e.g. feminist methods in CEHAT and AJWS). While these approaches overlap with intersectionality, on their own they are not necessarily intersectional.

The case studies indicate that the primary value of an intersectional lens lies in its ability to shed light on the distinct ways in which individuals or groups experience various forms of disadvantage or oppression. The case studies consistently emphasise that incorporating an intersectional perspective into their research enabled them to recognise differentiation within broadly categorised "disadvantaged", "marginalised" or "vulnerable" groups, what the case study by CEHAT on SGBV calls "differentiated vulnerabilities" (CEHAT case study: 12).

The case studies repeatedly underscore that incorporating an intersectional perspective into their research enabled them to recognise the cumulative effects of multiple social identities and systemic factors that result in increased vulnerability, disadvantage or discrimination for individuals or groups. This approach facilitates a more precise identification of the specific interlinked vulnerabilities experienced by individuals and groups. In turn, this heightened accuracy leads to more targeted and effective responses to these intricate challenges faced by these individuals and groups.

This distinguishing characteristic of applying an intersectional perspective emerges repeatedly in the case studies as a conceptual innovation, not necessarily offered by other theoretical approaches and methods. This value was evident in many of the case studies:

- The authors of the case study on sexual and reproductive health and rights among Syrian refugees in Lebanon emphasise the value of an intersectional lens in comprehending "nuanced insights into the complexities of women's experiences". This approach illuminates disparities based on factors such as ethnicity, race, geographic context and socio-economic status that would have "otherwise remained unnoticed". They argue that understanding these complexities is essential for crafting "region specific" policy recommendations to address the diverse needs and realities of refugees in specific locations.

- In the case study by ForestAction, based on an action research project, an intersectional framing supported the team in addressing research questions about women's participation in community forest user groups and the benefits that this might hold for women's economic empowerment. By avoiding conceptualising women forest users as a universal category, the team was able to explore questions such as "which women are represented in CFUGs [Community Forestry User Groups] benefits? And who are excluded? What are the reasons behind the exclusion of certain groups of women?"

- The authors of the case study produced by American Jewish World Service (AJWS) and the Centre for Enquiry into Health and Allied Themes (CEHAT) highlight how, in order to develop effective solutions to sexual and gender-based violence (SGBV) experienced by young women and adolescent girls, they required an analytical framework that could illuminate how not only gender, but also the intersections between gender and age (among other identities), mutually compound vulnerability to violence and other inequities. The authors state that their use of intersectional gender analysis "helped reveal the blind spots" in the lived experiences of survivors that are lost when approaching SGBV data in the aggregate. This supported them in developing insights that result in appropriate, contextualised SGBV policy and interventions.

- In their research about online violence against political candidates, the InternetLab found that "the nature of misogyny changes according to other social markers" – a finding that would not have been as readily identifiable if the team did not adopt an intersectional perceptive in their research design by, along with other strategies, ensuring diverse representation in case selection in relation to different social markers intersecting with gender.

- In a similar manner, the authors of the case study on online violence against political candidates, conducted by IT for Change, note: "A broad finding from our analysis of the Twitter mentions collected and annotated was that all women in the sample faced some amount of abuse on Twitter. However, it was quite evident that the nature and amount of abuse these women faced varied significantly depending on their identity and social locations". They continue that an

intersectional lens to online misogyny "helped us understand and explain the disproportionate amount of abuse and hate that Dalit and Muslim women, particularly those from opposition parties and political dissidents, faced when compared to other women" (IT for Change case study: 23).

- In the case study by SSWH in The Gambia, focused on their research to improve maternal health, an intersectional lens assisted the team to refine commonly used public health approaches to consider young pregnant women's health inequities "not as static, inevitable disadvantages suffered by them, but as differentiated by age, ethnicity, education, and other factors, within interlocking social systems and patriarchal structures of power they are embedded in". This information has enabled more precise targeting of specific sub-groups of women for maternal health interventions and programmes, contributing to more effective strategies to promote maternal healthcare utilisation (SSWH case study: 9).

> *"Intersectionality provided us with a useful framework to understand how the complexity of social inequalities and interconnecting power relations in which the women in the sample are embedded might interact with the architecture of social media platforms and how it influences the nature of trolling and abuse they faced on Twitter."*
>
> *IT for Change case study, pg 21*

- The authors of the WIEGO case study argue that research that considers how multiple overlapping identities create particular forms of vulnerability and risk can guide impactful advocacy. In this manner, an intersectional lens helped identify "what hierarchies create dimensions of power and difference and which of these differences are fundamental to consider […] for research that supports advocacy in the informal economy".

It is important to note that the WIEGO and Women Media Collective (WMC) case studies did not use intersectionality as named and theorised in academic discourse. Instead, they used contextually embedded conceptual lenses that offer similar insights. WIEGO describes how their research and advocacy approach has been honed over time to consider people's position in the informal economy (the focus of the network) in relation to a "disaggregated livelihoods approach" and a "segmentation and risk model". In particular, their use of a pyramid-of-risks model illustrates how gender intersects with occupation and earnings. This conceptual approach – developed through WIEGO's engagement with workers and membership organisations representing their rights and interests – is not named as intersectional, yet sheds light on how "informal workers face multiple marginalisations that intersect to shape their varying degrees of vulnerability across multiple structures of the social system" (WIEGO case study: 11).

Similarly, the WMC case study illustrates how their research, which was informed by feminist transformative politics, developed along a different trajectory than that of northern intersectionality scholarship, yet offers methodological tools that achieve many of the same insights as intersectionality. The authors of the WMC case study developed their conceptual lens through engaging with southern feminist scholarship and the contextually embedded realities faced by women navigating multiple interlocking vulnerabilities. They argue that their work has always been intersectional, even if they do not use the discourse of intersectionality as it emerged in the global North. Furthermore, they advocate for their project "to be considered as one where the philosophical orientation and political emphasis of intersectionality emerged through a different path". This trajectory is informed by their long history of working with women in communities that presupposes women's lives as inherently complex, shaped by a multitude of identities, and that

research in this context is premised on the urgency of addressing women's oppression and experiences of violence.

These points emphasise that the ability of research to generate intersectional insights emanates from the researchers' longstanding interest in their area of study and the formulation of questions that are inherently grounded in an understanding of complex contexts. Regardless of whether they initially labelled their research as intersectional or not, their projects align with the argument presented in Section 2 of the paper. This argument asserts that various origins exist for comprehending the interconnections between different forms of marginalisation and disadvantage without necessitating explicit use of the terminology of intersectionality. It is noteworthy, however, that their work affirms the central contributions of intersectionality.

4.2 How does one 'do' intersectional research?

There is no singular or preferred method of translating intersectionality into methodological practices. The case studies highlight three guiding principles for conducting research to obtain intersectional insights: embedding research in context; maintaining scientific rigour and ethics in identifying social categories for analysis; and recognising the value of methodological plurality. These principles contribute to debates on operationalising intersectionality (Bailey et al., 2019; Misra, et al., 2021; Rice et al., 2019). This section outlines these principles and situates them in relation to existing literature. The section argues against a narrow framing of intersectionality that inadvertently privileges certain ways of "doing" intersectionality over others.

4.2.1 Embed research in context

The case studies underscore the importance of social and historical context. While all social science research generally considers context, an intersectional lens pays particular attention to the power dynamics in distinct spatial and temporal contexts in which marginalisation and privilege play out. This lens encourages researchers to see social categories, such as race, gender and caste, not as fixed but as contextually contingent, requiring researchers to understand when and where these differences matter the most, and to develop targeted responses to address the challenges of the most marginalised people in society.

> *"Carrying out intersectional research requires being cognizant of how a variety of socially constructed dimensions of difference intersect with each other and with different contexts to shape outcomes."*
>
> Misra et al., 2021: 13

Many of the studies stem from a commitment to participatory action research that emphasises deep knowledge and integration in the local context to interlink research and social change. Participatory action research underscores the importance of the local context in guiding decision-making regarding what to research, who the partner subjects of research ought to be and how to analyse and disseminate the research. This commitment also stresses the value of community proximity in comprehending diverse identities and categories, as elaborated in the subsequent section.

For example, the authors of the case study on the challenges Syrian refugee women face accessing sexual and reproductive health and right (SRHR) in Lebanon illustrates how an intersectional lens guided their selection of four diverse regions in Lebanon (Beirut, Bekaa, North Lebanon and South Lebanon) with variations in employment, education, health services, migration history and familiarity with refugee populations, among other things. The study reveals that vulnerabilities to GBV and SRHR service access among Syrian refugees are influenced not only by the intersection of

citizenship, ethnicity and gender but also by regional contexts that impact health services, economic opportunities and socio-economic status (SRHR case study, pg 16).

Likewise, the case study by Forest Action Nepal that draws on action research to better understand and address the diverse forms of discrimination faced by women in forest-based enterprise development spans two distinct regions: Sindhupalchok in the mid hills and Nawalparasi (E) district in the lowlands. The case study shows how these different regions, marked by differences in agroforestry practices, ecological landscapes and socio-cultural groups, intersect with other factors, including women's marital status and land-ownership patterns, to influence women's control over productive assets, participation and benefit-sharing in Nepal's forestry sector.

The crucial point is that context is pivotal to the selection of the relevant social categories and appropriate methods for obtaining intersectional insights. These choices are not solely determined by the research question; they are also shaped by the researcher's understanding of the broader context in which the research is conducted.

The authors of the WMC case study offer an example of how investing in a "reframing workshop" at project inception assisted the team to start building methodologies that were informed by contextual priorities and variations:

> In the preparation stage, the local research teams participated in a three-day "reframing workshop" that was intended to provide information on the research aims and methods as well as to build a shared understanding of key social-political phenomena in the Indonesian context by bringing together experts on a range of relevant topics, such as the history of Islamist extremism in Indonesia, gender and identity politics, young Muslim women's agency in social media, and Indonesian government policy framework on terrorism. Preliminary discussions were also conducted on methodological issues, such as on virtual ethnography and on writing life stories (WMC case study: 18).

The authors also share how their project workplan supported the integration of intersectional methods and practices throughout the project cycle. Much like "gender fade" where integration of a gender lens in research does not consistently carry through all aspects of implementation and analysis, incorporating intersectionality can also falter over the course of the project. For the WMC team, this was mitigated through regular meetings accompanied by mentorship from a team member with theoretical and methodological expertise:

> Throughout the research process, regular online spaces were created for exchanges across the three research sites over three stages of the research: the preparation, implementation, and write-up. […] These online spaces also became a means of mentoring with active participation and substantive contributions from country lead researcher and a senior feminist academic who engaged in the discussions (WMC case study: 19).

4.2.2 Scientific rigour and ethics in identifying social categories

Identifying the relevant social categories to understand disadvantage or oppression in a specific project is a complex and context-dependent undertaking. It is not necessary or practical to consider every conceivable identity category and intersection. Instead, researchers pragmatically determine which forms of difference are most prominent or pertinent to the specific inequality or injustice they seek to comprehend and address. This decision is guided by various strategies, as outlined below.

Where feasible, working closely with communities, grassroots organisations and other actors familiar with the study context can help refine the scope of social categories relevant to the study's research question. Several case studies emphasised that such a collaborative approach creates the conditions in which marginalised communities are centred, enabling researchers to be better able to engage the salient social categories shaping participants' experiences of risk and vulnerability within their particular contexts, as well as identify priorities for action. For example, "As a result of WIEGO's direct engagement with organisations of workers in informal employment, its research and policy agendas strive to reflect workers' contextual needs and demands".

In the case study by CEHAT and AJWS (case study: 22), the authors note that partnering closely with SGBV service organisations helped the research team base their selection of identity categories on the contextually embedded insights of organisations on which intersecting identities shaped the women and girls who accessed their services. The authors emphasised the pivotal role of frontline workers in choosing specific social categories for analysis, leveraging their "insider–outsider perspective." These workers were especially well-positioned to recognise connections between variables and they identified the necessity for comprehensive data collection across these factors. This recognition transformed data collection into a "means to enhance their understanding rather than a funder-driven exercise". The frontline workers played a vital role in ensuring that the collected data not only deepened their understanding of the "differentiated vulnerabilities" of young girls and women, but also informed context-based interventions.

Other strategies described by case study authors include reviewing existing literature. SSWH noted that a literature review guided their selection of specific identity categories: the review "revealed gender, education, age and ethnicity as major social determinants of maternal health in The Gambia" (SSWH case study: 9). IT for Change described how they selected identity categories for their Twitter analysis based on insights from previous work on online gender-based violence, as well as "available literature about intersectional differences that inform the lived experience of women in digital spaces in India" (IT for Change case study: 18).

The case study by InternetLab notes the "complexities in the attribution and self-definition of race and ethnicity" in identifying relevant social markers for inclusion in research. The authors describe below their decision in their research about online political violence against journalists, where information about social markers was not publicly available:

> [W]e decided to take responsibility as researchers, especially in the definitions of ethnic-racial belonging, assuming that we might incur mistakes. Making mistakes seemed less severe than foregoing consideration of a marker as important as race in the Brazilian context (Internet Lab case study: 23).

WIEGO also emphasise the importance of "contextual sensitivities" regarding the categories of race/ethnicity. The authors highlighted the integral connection between racial hierarchies and structures of power and the establishment of capitalist economies world wide. In South Africa, where capitalism and racism have long been intertwined and mutually reinforcing, "the boundaries of oppression may not be clearly defined" (WIEGO case study: 23) . Consequently, "workers may find it easier to articulate their struggle based on one or more of their multiple identities (e.g. Black and/or working class) because the intersections are inherently implied". The primary challenge is to avoid an additive approach that could "diminish the potential to understand the complex ways in which inequalities intersect". This consideration guided the Global Study Advisory Team's decision to omit a question on race/ethnicity in a large-scale survey of nearly 2 000 informal workers.

The literature underlines the importance of prioritising self-identification by communities, where possible, and highlights how global advocacy agendas may influence the adoption of northern identitarian language in settings where such language does not hold contextual relevance (Lynch et al., 2022a). Research on the relevance of LGBTIQ identity categories in African contexts indicates that in many settings, identitarian language such as the LGBTIQ acronym contrasts with local terminologies for sexual diversity. However, donor agendas and global activism often influence local organisations to adopt this language, potentially reinforcing narratives of sexual difference as foreign and "un-African" (Lynch et al., 2022b) This underscores the need to engage with participants' own descriptions of social difference.

4.2.3 Embrace methodological plurality

Various methodologies prove valuable in unravelling the interconnected forms of marginalisation and in understanding how inequalities operate. The choice of methods depends on the specific study and contextual considerations. With social change as a key driver of intersectional research, Rice et al. (2019) propose an additional guiding factor for method selection. The emphasis is on choosing methods capable of generating intersectional insights that can bring about change. Method selection, therefore, should be driven by the objective of producing intersectional insights for social change, and the choice should be guided by the study's context and the overarching goal of achieving social justice.

“Intersectional research can take place at multiple analytical levels – micro, mezzo and macro – but it is neither necessary nor ideal to address in detail every dimension of each level. Nonetheless, it is important to address why some levels and dimensions are the subject of focus, and to explain what types of analysis might be facilitated and which might be limited as a result” (Rice et al., 2019: 416).

> *“The deployment of intersectional frameworks is not yet crossing methodological and disciplinary boundaries. Instead, there is low methodological variation with the majority of studies drawing on qualitative methods and positioned in Social Sciences and Humanities disciplines. The paucity of intersectional quantitative studies and near absence of science, technology, engineering and mathematics (STEM) disciplines echo the global research landscape.”*
>
> Lynch et al., 2020: 15

Intersectional research is dominated by qualitative methods which are “well-suited to studying complex, interrelated issues and capturing nuanced and contextualised experiences” (Lynch et al., 2020: 16). The authors of the WMC case study note that their choice of qualitative data collection (life histories) “was informed by the need to understand women’s lives in all their complexity” and “yielded information that was not limited to how the [researcher selected] identity categories alone impacted women’s lives”(WMC case study: 13). The ForestAction Nepal case study outlines the pivotal role of participatory mapping, storytelling and games in facilitating continuous learning and engagement during the research process. Alongside focus group discussions and ethnographic observation, these methods proved critical in unravelling the "hidden power dynamics" that influence access to forest-based resources (ForestAction case study, pg 16).

Considering the ability of qualitative methods to capture complexity, it is unsurprising that qualitative methods dominate intersectionality scholarship. A review of African scholarship applying an intersectional framework concludes that “there is low methodological variation with the majority of studies drawing on qualitative methods and positioned in Social

Sciences and Humanities disciplines. The paucity of intersectional quantitative studies and near absence of science, technology, engineering and mathematics (STEM) disciplines echo the global research landscape" (Lynch et al., 2020: 15).

Many of the case studies employ mixed methodologies, an approach endorsed as good practice in intersectional gender-transformative research (Lynch et al., 2020: 16). However, it is crucial to acknowledge the risk in suggesting that any specific method or set of methods is universally good or appropriate for intersectional inquiry. In certain cases, a single method may indeed be the most effective choice for a particular research inquiry.

Ultimately, the goal of research informed by intersectionality is to ensure that the methods chosen yield intersectional insights. As such, intersectional quantitative methods remain underdeveloped, yet can yield findings that drive transformative outcomes (for resources on quantitative methods see Box 3 below). While the majority of case studies used qualitative approaches, those by WIEGO and SSWH offer insights into common challenges and strategies for overcoming them in quantitative designs. For example, the WIEGO authors note the challenge of obtaining an adequate sample size for differentiated analyses exploring multiple co-existing vulnerabilities and inequalities linked to social identities:

> With smaller city sample sizes, there were moments where it would not have been methodologically appropriate to make inferences regarding differentiated impacts. Relatedly, the smaller city sample sizes did not allow for a more explicit intersectional analysis from both an intrasectoral and intersectoral angle (WIEGO: 24).

Box 3: Resources on intersectionality in quantitative designs and methods:

- Fehrenbacher, A.E., & Patel, D. (2020). Translating the theory of intersectionality into quantitative and mixed methods for empirical gender transformative research on health. Culture, Health & Sexuality, 22(S1), 145-160.
- Rouhani, S. (2014). Intersectionality-informed quantitative research: A primer. The Institute for Intersectionality Research and Policy, SFU.
- Scott, N. A., & Siltanen, J. (2017). Intersectionality and quantitative methods: Assessing regression from a feminist perspective. International Journal of Social Research Methodology, 20(4), 373–385.

Authors of the case study by SSWH describe their approach to integrating an intersectional approach to sampling:

> Quantitative data collection prioritized achieving minimum sample sizes for each group in the analysis, enabling meaningful statistical analysis. We strategically oversampled rural women and urban men to allow sufficient statistical power for cross-group comparisons and intersectional analyses. Additionally, we used snow-ball sampling to recruit marginalized or hidden rural minority ethnic women and adolescent girls that are difficult to access through traditional sampling methods (SSWH case study: 11).

The scholarly attention to operationalising intersectionality in research is essential to developing resources for strengthening the ability of researchers to integrate intersectionality principles into their research. However, an overemphasis on "correct" or "appropriate" methods of intersectional inquiry runs the risk of favouring some strategies over others and breaking the connection between

the political goals of research and the methods that serve these goals. The caution directed at qualitative researchers generally, to avoid the "danger of reifying methods in the same way as their colleagues in quantitative research have done for some time", can easily be applied to intersectionality research too (Chamberlain, 2000 in Lynch, 2023:286). It is for this reason that we recommended that the IDRC avoid a formulaic approach to promoting intersectionality (see Section 5). Rather, we suggest investing in developing subject-specific resources that are adaptable to various settings and research methods, and that consider diverse levels of familiarity with intersectionality.

4.3 What does intersectional praxis look like and how can it contribute to social change?

The insight emphasised in the preceding section – highlighting the value of an intersectional lens in illuminating interlocking forms of oppression and marginalisation often invisibilised in single-axis analyses – could remain unpoliticised if not for the intertwined focus within this framework on intersectional praxis. Intersectional praxis is motivated by a commitment to not only documenting inequalities or understanding how power structures work, but to acting on such recognition and bringing about social change. As Townsend-Bell (2009: 3) argues, it is this commitment to "ending relations of dominance" that distinguishes intersectional praxis from other forms of interventions, such as attempts at diversity and inclusion.

It is important to recognise that the demarcation between research and praxis is to some extent artificial. The case study authors consider many of the practices and principles identified in the case studies, and discussed below, as essential to research that yields intersectional insights. For instance, the emphasis on horizontal and non-hierarchical collaboration between researchers and participants can open avenues for a more nuanced understanding of participants' lived experiences. This, in turn, enhances the likelihood of selecting the most significant social categories that shape their experiences and employing methods that yield accurate and robust findings.

4.3.1 The research process itself as transformative

Many of the aspects of intersectional research perceived as embodying "praxis", such as knowledge co-production, affirm earlier activist traditions that emphasise flattening hierarchies while also recognising and validating a variety of knowledge sources. Many of the projects are informed by participatory action research and/or feminist methods and practice that have long affirmed the co-production of research that "involves the collaboration of a diverse group of actors to produce new knowledge and transform social relations towards a more equitable and just future" (WIEGO case study: 9). For WIEGO, "co-production is both a mobilising and political tool that can strengthen the capacity of informal worker organisations to leverage claims-making opportunities with the state and relevant stakeholders".

WMC's emphasis on "movement building" saw them partner with local level organisations, activists and community leaders while also training emerging young women researchers as part of a broader effort to build networks and promote solidarity. Similarly, AJWS and CEHAT, who collaborated with SGBV service organisations to collect data, also supported and facilitated conversations "building space for action-oriented use of the data" (AJWS and CEHAT case study: 16). Aligned with principles of feminist and gender transformative approaches (Mullinax et al., 2018), these practices contribute to the research process in itself being transformative and strengthening ground-level activists and organisations to influence policy decisions.

4.3.2 Research and action intertwined

Several of the case studies are based on research by organisations that consider research and action as interconnected. Further, these organisations have organisational mandates to conduct research that informs, among others, advocacy, movement building, policy development and/or programming. While some academic researchers hold this same commitment, this is not always the case and, even if so, being located in institutions that are not adequately resourced to bridge knowledge action gaps can limit the potential for intersectional praxis. WIEGO foregrounds "knowledge co-production [that] serves as a framework to produce actionable data that raises the voice and visibility of informal workers" (WIEGO case study: 10). This is achieved through ensuring that research supports movement building and informs local—global advocacy processes. Similarly, InternetLab is "a policy-oriented research organisation with a mandate to conduct research that advances rights-oriented internet policy".

Partnerships with organisations with such a mandate can assist in addressing such limitations and can contribute to mutual capacity building. ForestAction offers an example of this where the organisation intentionally selected consortium partners that are "policy champions and [can] contribute to shaping legal and regulatory provisions in favour of women run forest-based business" (ForestAction case study: 22). American University of Beirut (AUB)'s effective integration of workshops with the training of Syrian refugee women as community volunteers on GBV and SRHR is another. This approach facilitated the transformation of "intersectional insights into practical actions". These trained community members subsequently became "agents of change within their communities", organising additional training sessions, workshops and awareness campaigns specifically focused on SRHR and GBV (SRHR case study: 17).

4.3.3 Co-production and flattening hierarchies

Several of the case studies reference a feminist praxis that recognises the inevitable entanglement of researchers themselves with the complex power dynamics that mark the settings in which they conduct research and, importantly, intentionally engages these dynamics. In the WMC case study this is articulated in the following way by the Indonesian research team:

> To address the chronic imbalance of power between the national/centre and the local, the Indonesian researchers set up a partnership model in which the local research partners were given sufficient space to establish and articulate their distinct interests and positioning on the way the research is conducted at field level. The research project's recognition of the need for foregrounding the local political necessities at the country levels was taken forward by national teams in the local political contexts as well (WMC case study: 17).

In addressing power differentials within research teams, which required ongoing self-reflexivity, the case studies also highlight how hierarchies can be deconstructed in researcher—community relationships. For instance, WIEGO note "by valuing a plurality of perspectives, co-productive processes seek to establish more horizontal relationships among all actors involved, while recognising the existence of power and dimensions of privilege" (WIEGO case study: 12).

Such flattening of hierarchies is also present as a principle in other approaches – such as feminist, participatory and social justice approaches (Mullinax et al., 2018). The case studies, however, illustrate how adopting an intersectional approach facilitates research impact. Critical praxis that values non-hierarchical collaboration with diverse participants, and organisations representing their needs and interests, can assist in ensuring that findings are used optimally in driving social change. In the WIEGO case study, this was evident in ensuring that research findings are made available in a

timely manner so that partners can put the evidence to use in their advocacy to bring about change to the issues directly impacting them. Another strategy was ensuring partner organisation representation during dissemination activities, such as webinars, to facilitate access to spaces where they can raise their policy demands.

4.3.4 Disseminating practices for policy impact

Intersection praxis, as outlined by Townsend-Bell (2009), can be applied at various research stages, including research dissemination and engagement. Townsend-Bell (2009: 1) outlines a number of ways to enact a "politics of accountability", defined as a commitment to aid in the eradication of oppressive relations and which can be implemented in the research dissemination stage. These strategies include the following: First, making research results and knowledge accessible and usable beyond academic publications, reaching diverse language groups, individuals and social groups with varying abilities and educational levels. Second, assessing potential impacts on various individuals and organisations, such as local governments, social services, neighbourhoods, schools, etc. Third, ensuring that the research is beneficial to participants in their social and political activities, aiding in policy development, campaign building, organising, movement building and advocacy.

The WIEGO case study exemplifies the effective dissemination of research results tailored for diverse target audiences to drive change. The study discusses various instances where co-produced outputs were linked to ongoing advocacy efforts. This included the creation of city fact sheets highlighting the pandemic's impact on specific worker groups and specific policy demands. These fact sheets were used in city-specific research launches and served as a means to engage local stakeholders. In addition, the study involved the production of rapid analyses on thematic issues through Policy Insights.

IT for Change used the findings from the Twitter study in their ongoing advocacy work that regularly contributes to legislative and policymaking at both national and global levels, addressing issues such as countering online gender-based violence, platform accountability and related matters. They note that the findings from the Twitter study allowed them to highlight regulatory "blind spots" in social media governance that reflect the "experiences of women situated at the intersection of multiple identities". For example, social media platform content filtering tools that are not caste sensitive often fail to remove caste-based hate speech, particularly those involving regional language and containing local references/terminologies.

IT for Change's findings on how the "intersectional location of women in the political field" affects the nature and amount of abuse they receive on Twitter has been used in two of the major policy submissions: (i) comments on the amendment to India's Intermediary Liability Rules, 2021, and (ii) feedback on UNESCO's Draft Guidelines for Regulating Digital Platforms. In these submissions, IT for Change urged lawmakers, policymakers and technology companies to "invest in training local human moderators equipped with the necessary cultural competence to identify forms of trolling and enhance proactive monitoring tools" (IT for Change case study: 26).

IT for Change is also currently developing a resource guide to assist judges and lawyers in adjudicating cases of online gender-based violence in a gender-sensitive and rights-based manner. Recognising that lower-level courts often fail to grasp the intersectional nature of violence against women, whether online or offline, the resource guide dedicates a module to intersectionality. This module aims to "introduce and sensitise judges to the importance of adopting an intersectional lens when considering a survivor's experience" (IT for Change case study: 27). By identifying the

multiple forces of oppression that co-constitute the survivor's experience, judges can apply the appropriate laws and invoke all available remedies. The module draws examples from the Twitter study to illustrate how the experience of online hate differs qualitatively for women based on their multiple and intersecting social locations and identities.

4.3.5 Building alliances and social movements

Intersectionality has been considered by some as promoting "identity politics" to the detriment of coalition building (Rice et al., 2019). The case studies, however, offer instances in which the research process deepened or created alliances between marginalised or vulnerable groups and others in their community and with academics and policy makers. The case study by WIEGO describes how participating in project activities created opportunities for diverse participants and organisations representing their interests to connect to each other and feel less isolated in their experiences. This strengthened social movements and advocacy efforts among workers in informal employment at both local and global levels.

In Accra, Ghana, where WIEGO, through their Focal Cities team, has a well-established history of working with local actors, the research served as a critical "tool for workers' alliance-building, particularly with the trade union movement, academics and policy-makers". However, WIEGO also note how an intersectional perspective that draws attention to "differentiated experiences of inequalities" can present tensions in organising efforts to build solidarity. They note that "forging consensus as to how to address these organising challenges is essential to avoid weakening or fracturing organisations". WIEGO emphasises how the goal should be to raise awareness of the differentiated experiences as a pathway to building organisations' internal democratic capacities.

The case study by ForestAction details how marginalised women were at times excluded from empowerment initiatives where comparatively more privileged women, as decision-makers in these spaces, would overlook their needs and interests. The project team hosted policy dialogues in which marginalised women entrepreneurs could discuss "the policy challenges they face with local government and policy implementers, including the Divisional Forest Officer, Small and Cottage Industries Officials, and financial institutions". The team notes that inviting "elite women" to the policy dialogue event has resulted in some positive change towards more equitable distribution of benefits from empowerment initiatives (ForestAction case study: 21).

5. Future directions and recommendations

Operationalising intersectionality in development research is challenging because it is more of a lens than a rigid approach. There is no one-size-fits-all approach to applying an intersectional lens and there is a risk of it being reduced to a check box, thus losing its transformative potential.

While practical guidance and capacity building are essential, the IDRC needs to find an approach to incorporating intersectionality in its programming that aligns with its goals and existing frameworks. The IDRC should view this as a learning journey. While experimentation is encouraged, caution is needed to safeguard against misinterpretation, co-option or dilution of intersectionality. Collaboration with global South partners is crucial to ensuring the meaningful application of intersectionality. Collaborative efforts with global South partners is also critical to ensure that researchers deepen their understanding of intersectionality in ways that align with their specific contexts and focus areas.

As the IDRC deepens its engagement with intersectionality, this report recommends a comprehensive approach that should involve the following:

- **Conceptual clarity:** Strive for clear definitions and consistent use of intersectionality while recognising the diversity in how the term is defined, adopted and applied.

- **Integration into existing frameworks:** Collaboratively work with partners to incorporate intersectionality into existing tools and frameworks.

- **Tailored resources:** Develop subject-specific, programme-aligned and context-appropriate resources for building research capacity to safeguard against a formulaic approach. It is crucial to amplify southern perspectives and establish peer learning opportunities and partnerships.

- **Intersectionality in grant-making practices:** Resist the uncritical adoption of intersectionality and scrutinise its implications for internal processes and power dynamics. The IDRC should consider developing *principles* for integration throughout the grant-making cycle that emphasise local context, flexibility and a commitment to addressing systematic inequalities.

Further elaboration on each of these recommendations follows below.

5.1 Conceptual clarity

The word intersectionality is subject to diverse definitions and interpretations, with ongoing contestation over its origins and purpose.

The case studies and existing literature highlight the importance of considering intersectionality as a lens rather than a stand-alone theory. In light of this, the IDRC needs to refine its understanding of intersectionality in the context of development research and use it in a consistent manner.

Box 4: IDRC's definition of intersectionality

A theoretical approach or framework for understanding individuals' lived experiences (of privilege or oppression) which highlights that social categories and identity factors (such as gender, sexual orientation, age, class, race, caste, ethnicity, citizenship status, migration status, religion and disability) are mutually constituted and overlapping in dynamic ways rather than operating in isolation from one another (e.g., gender as separate from race) or in an additive way (e.g., gender plus race equals greater disadvantage).

Source: IDRC, 2023: Glossary of terms

While the IDRC's current definition (see Box 4 above) captures the idea that different categories of difference intersect to produce distinct experiences of disadvantage/privilege, we recommend avoiding the characterisation of it as a theory or a "theoretical approach". Instead, we propose defining it as a conceptual "tool" or "lens" that prompts researchers to comprehend social differences and power comprehensively and that is adaptable to various theoretical and methodological approaches.

While the terms “theory” and “conceptual tool” are related, our distinction lies in their purpose and applicability within existing theoretical frameworks. The function of a theory is often to provide a general explanation or model for understanding or predicting phenomena. In contrast, a conceptual tool is a more focused and practical instrument for analysis that is adaptable to specific contexts and aspects of a phenomenon without necessitating a broader explanatory system. Moreover, it empowers researchers to integrate intersectionality into diverse theories or frameworks, broadening the analytical toolkit and making a significant contribution to intersectionality scholarship in the global South (Lynch et al., 2020: 10).

The case studies and existing scholarship highlight the value of adopting the term “intersectional gender analysis” in development research and policy. However, it is critical to foreground “intersectional” in guidance for grantees and institutional frameworks to avoid unintentionally promoting an additive approach. This involves approaching gender programming *through* an intersectional lens rather than integrating intersectionality concepts into gender transformative approaches. Ingrid Lynch (2023: 9) notes that gender transformative approaches (GTA) often treat intersectionality as “an add-on”, evident in “gender integration checklists that consider an intersectional approach as a more sophisticated, but not essential, component of such integration”. This is exemplified in the gender responsiveness continuum used by many development funders, including the IDRC. With this in mind, the IDRC should avoid using “gender and intersectional analysis” and instead emphasise intersectionality, for example, “intersectional gender analysis”.

Gaining clarity on the concept of intersectionality for development research will also require the IDRC to recognise that intersectionality is more than a conceptual tool; it is also a critical praxis closely aligned with other transformative methods and approaches. Recognising its utility as a form of critical praxis has implications for funding and grant making, as discussed below.

5.2 Integrate intersectionality into existing tools and frameworks

Given the absence of a one-size-fits-all approach for operationalising intersectionality in development research and the danger of it becoming a buzzword that overshadows other approaches or reduces it to a checkbox, the IDRC should not simply adopt intersectionality but engage in the challenging task of finding an approach that aligns with its goals and existing frameworks. We propose that the IDRC begin this journey by examining and refining existing research process documents using intersectionality as a framing idea or “lens”. This approach aligns with the approach we took in this project, which sought to critically evaluate intersectionality vis-à-vis other approaches to determine its distinctive value.

A suitable starting point could be the IDRC’s existing gender-transformative resources and methods that were frequently used in the case studies. While some argue that GTA are inherently intersectional, there are instances where the tools employed lack any acknowledgement of intersectionality (Lynch, 2023). We recommend examining gender transformative resources through an intersectional lens in an open and critical manner. This exercise should be approached flexibly, such as by questioning the extent to which a gender transformative approach can be considered intersectional. Or, alternatively, by questioning the extent to which research deemed “gender transformative” is inclusive of intersecting identities and experiences. Collaborating with partners in the global South is critical to the process of integrating intersectionality into IDRC’s existing resources and frameworks.

It is crucial to emphasise that in proposing a focus on gender programming, there is a risk of confining the discussion on the relevance of intersectionality to specific programme areas and approaches more aligned with it. While a good starting point, this focus should not come at the expense of exploring the value of intersectionality concepts and principles across diverse research areas and IDRC programme areas, such as climate change and resilience and science, technology and innovation. All projects – regardless of the extent to which gender is central to the research topic, or whether project implementation in itself is transformative – can benefit from an intersectional approach to conceptualising the research problem (e.g. considering who will benefit from or be end-users of the research findings, product or innovation), constituting research teams and developing knowledge translation activities.

5.3 Tailored resources: No one-size-fits-all approach

The case studies and existing literature stress the need for subject-specific and context-appropriate resources to strengthen engagement with intersectionality. Concerns about institutional adoption of intersectionality potentially leading to oversimplification and depoliticisation highlight the importance of tailored resources.

To address these concerns, the IDRC should avoid a formulaic approach and refrain from creating generic toolkits for building research capacity. Instead, it should assess the need for tailored resources and develop them accordingly. These resources should be subject-specific, adaptable to various settings and research methods, and should consider diverse levels of familiarity with intersectionality.

Finding ways to introduce the concept to researchers with limited exposure, while not alienating those familiar with it, such as partners embedded in feminist methods, is challenging but essential. Equally important is aligning resources with thematic areas identified as important, such as climate change and global health, and the existing theoretical approaches used in these areas, such as GTA and the socio-ecological model.

Existing toolkits often target specific disciplines, such a Sociology (Choo and Ferree, 2010) or Psychology (Cole, 2009) or a thematic area. For example, the World Health Organization toolkit “Incorporating Intersectional Gender Analysis into Research on Infectious Diseases of Poverty” caters specifically to health researchers (WHO, 2020). Similarly, the "Practical Pathways to Integrating Gender and Equity Considerations in Antimicrobial Resistance Research" (Lynch et al., 2023) is tailored to antimicrobial resistance research. The Centre for Feminist Foreign Policy crafted an “Intersectionality and Cybersecurity Toolkit” for civil servants and policymakers working on cybersecurity issues in the UK government (Conway and Kaur, n.d.). In addition, the Equality Challenge Unit that supports equality and diversity in higher education institutions across the UK offers a resource on "Intersectional approaches to equality research and data" (Christoffersen, 2017).

The roundtable discussions we integrated into the project approach, which emphasised creating dialogical space for peer learning, were highly valuable and in demand. Many participants in this collective effort expressed the need for more learning spaces, resource sharing and, as mentioned earlier, a deeper engagement with southern voices and contextually relevant perspectives. It is important to note that the process of writing up the case studies often consolidated internal learning within organisations, such as Internet Lab's internal reading group on intersectionality in 2019, or promoted internal learning and debate about intersectionality (Internet Lab case study:

10). While case study authors highlighted the need for more peer learning spaces, it is crucial to underscore that effective learning in these spaces demands reflexivity, adaptation and experimentation to identify the most relevant strategies in each context.

It is for this reason that we stress the importance of the IDRC collaborating with partners in the global South to ensure inclusivity and avoid a prescriptive approach. It is also critical to amplify perspectives from the global South and prioritise peer learning opportunities and partnerships to deepen locally relevant understandings of intersectionality and to generate ownership. Failure to do so could result in potential pushback, as we are seeing against the progress made in achieving gender equality and justice, both globally and in Africa (Sonke Gender Justice, 2023).

5.4 Intersectionality in grant-making practices

Given that intersectionality is a central tool for understanding structural inequalities and power imbalances, it is imperative for international organisations such as the IDRC, who not only fund development research but also wield influence over development agendas, to engage with the concept introspectively. This requires a genuine commitment to questioning its implications for the grant-making process and the power dynamics therein.

Considering that funding for development research predominantly flows from the global North to the South, incorporating intersectionality principles into grant-making policies and practices can be a useful tool for prompting donors' reflection on power differentials in development research funding. Despite a growing interest in “intersectional grant-making practices”, guidance is lacking for development funders looking to advance intersectionality concepts in their grant-making practices and funded research. The uneven incorporation of an intersectional lens in funding policies and practices is highlighted in Lynch et al.'s (2022a: 7) study, with a current prevalence identified in North American and European public funding organisations.

The case studies overwhelmingly demonstrate not only the value of working intersectionally, but also the time and financial investment required when doing so. Building equitable partnerships with local communities and activist groups requires intentional project activities that are consistently adhered to throughout the project, for example, convening project partners during inception, training and capacity building, regular formal and informal support and debriefing. This adds to project timelines and requires adequate financial and other resource allocations. The authors of the CEHAT-AJWS case study emphasise that their intersectional feminist praxis, including their non-extractive approach to conducting research with grassroots service organisations, requires donors to share a commitment to working in this manner:

> [M]aking room for frontline workers to engage in such processes requires a top-down recognition of its value and an adequate allocation of resources. Often, because funders do not place value on this, there are insufficient funds allocated to data collection, entry and analysis. This includes everything from building the capacities of the entire team, to the time required to input the data, to investments in technology to aid grassroots workers to upload data to a shared database (CEHAT-AJWS: 22).

CEHAT and AJWS (case study: 5) describe the grant-making practices of the AJWS as involving “partnering with grassroots and feminist researchers and providing them with flexible grants, locally sensitive capacity building, networking opportunities, and sharing of knowledge that emerges from other research projects supported by AJWS”. These grant-making practices create an environment conducive to conducting research that yields intersectional insights and transformative actions.

Mullinax et al,. (2018) outline principles for institutional systems that support gender transformative research: internal organisational systems and policies aligned with feminist principles (e.g., more democratic and collaborative, and less hierarchical); institution-wide focus on gender transformative work; relevant capacity building and training of staff; and organisational frameworks that define, exemplify and provide guidance on gender transformative research. While there is a clear overlap between such a gender transformative framing and intersectionality, these practices can be refined to strengthen the latter in grant-making practices (Lynch, 2023). To this end, the IDRC could consider an internal review of current intersectional grant-making practices and frameworks. Scoping similar practices by other funders could help to identify elements with potential for adaptation and implementation by the IDRC. Examples include the Robert Bosch Stiftung's (2023) nine principles for integrating an intersectional perspective in work aimed at social change, as well as the Funders for a Just Economy's twelve best practices in intersectional grant making (Ryono, 2018). To ensure a thorough understanding and identification of creative and effective practices, this exploration should extend beyond development donor practices to encompass public funding agencies, non-profit organisations and social movements.

6. Conclusion

This report presented initial learnings on and insights into the application of an intersectional lens to development research. The community of researchers, practitioners and advocates adopting intersectionality in development research is growing rapidly, despite a lack of clarity and tailored resources. There is a pressing need to establish a network or dialogical space to enhance understanding, encourage debate and facilitate practical learning about the application of an intersectional lens at local and global levels.

The call to enhance understanding and awareness of intersectionality is clear, and organisations rooted in local contexts are well-positioned to lead this effort. It is our aspiration that the insights from this paper will propel this discussion forward and foster improvements in research, organisational practices and grant making to advance a more equal world.

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Appendices

Appendix 1: Case study reports

Case study Report 1: WIEGO

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Case Study Report 2: American University of Beirut

El-Fakahany S., Whaibeh E. Habib L.A. and El-Kak F. 2023. Navigating intersectional realities: On Syrian refugee women's sexual and reproductive health and rights in Lebanon. Intersectionality Case Study Report Number 2, Southern Centre for Inequality Studies, University of the Witwatersrand.

Case Study Report 3: Women and Media Collective

Haniffa F., Samuel K., Chandrakirana K., Emmanuel S. and Arasu P. 2023. Undoing "violent extremism": a three country collaborative research study by the Women and Media collective foregrounding the need for a more complex analysis of women's experiences of political violence. Intersectionality Case Study Number 3, Southern Centre for Inequality Studies, University of the Witwatersrand.

Case Study Report 4: Internet Lab

Valente M. and Martins F.K. 2023. Outcomes and challenges in adopting intersectionality as a method at InternetLab: Considerations for research and practice. Intersectionality Case Study Report Number 4, Southern Centre for Inequality Studies, University of the Witwatersrand.

Case Study Report 5: Centre for Enquiry into Health and Allied Themes (CEHAT) and American Jewish World Service (AJWS)

Arora S., Rege S. and Mullinax M. 2023. Using an intersectional lens to build stronger evidence and action at the grassroots level in India to build a comprehensive response to sexual and gender-based violence. Intersectionality Case Study Report Number 5, Southern Centre for Inequality Studies, University of the Witwatersrand.

Case Study Report 6: Forest Action Nepal

Baral S. and Lama K. 2023. Intersectional research for women's economic empowerment through Forest Solutions in Nepal. Intersectionality Case Study Report Number 6, Southern Centre for Inequality Studies, University of the Witwatersrand.

Case Study Report 7: Society for the Study of Women's Health (SSWH)

Lowe M., Ceesay F.K. and Nyaaba P. 2023. Applying an intersectional lens to understanding the social determinants of maternal health in The Gambia: Insights from the SIMAH Project. Intersectionality Case Study Report Number 7, Southern Centre for Inequality Studies, University of the Witwatersrand.

Case Study Report 8: IT for Change

Gurumurthy A., Rajkumar M. and Muhammed Ashraf M. 2023. Intersectional frames in digitalisation research: Revisiting a study by IT for Change about misogynistic trolling online. Intersectionality Case Study Report Number 8, Southern Centre for Inequality Studies, University of the Witwatersrand.

Appendix 2: Selected resources

General overview

- Cho S., Crenshaw K.W. and McCall L. 2013. Toward a field of intersectionality studies: theory, applications, and praxis. Signs 38: 785–810.
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Intersectionality and questions of method

- Bonu G. 2022. Intersectionality and participatory action research: A methodological proposal applied to the study of feminist spaces in urban contexts. *Culture e Studi del Sociale* 7(2): 215–233.
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- Rice C., Harrison E. and Friedman M. 2019. Doing Justice to Intersectionality in Research. *Cultural Studies ↔ Critical Methodologies* 19(6): 409–420.

- Scott N.A. and Siltanen J. 2017. Intersectionality and quantitative methods: Assessing regression from a feminist perspective. *International Journal of Social Research Methodology* 20(4): 373–385.
- Wheeler J., Shaw J. and Howard J. 2020. Politics and practices of inclusion: Intersectional participatory action research. *Community Development Journal* 55(1): 45–63.
- Windsong E.A. 2018. Incorporating intersectionality into research design: An example using qualitative interviews. *International Journal of Social Research Methodology* 21(2): 135–147.

Intersectional praxis

- Rodriguez J.K., Holvino E., Fletcher J.K. and Nkomo S. M. 2016. The theory and praxis of intersectionality in work and organisations: Where do we go from here? *Gender, Work and Organization* 23(3): 201–222.
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Appendix 3: Case study terms of reference

Objective of case study reports

The primary goal of the case study reports is to document the diverse application of an intersectional research (even if it is not called "intersectional") in their research.

This includes the following:

1. How the research "problem" (or question) is defined: From an intersectional lens, a research project sees social categories such as gender or race as heterogeneous and intersecting in dynamic ways. It also sees the context as structured by intersecting systems and structures of power.
2. How the research is carried out (i.e. questions of research design, methodology and data analysis).
3. How the research is disseminated and/or used in praxis, including policy uptake and application: An intersectional approach recognises the voice of those most directly impacted by an issue (or affected by policies put in place to address it) who are frequently excluded from mainstream conversations. It also has implications for organising and advocacy that transcend single-axis issues.

Note: We recognise that some of the research projects selected for case studies might be stronger in one of these areas (i.e. the framing of the issue or policy application) and weaker in another (i.e. data analysis). This is to be expected and is part of what we hope to learn from this collaborative exercise (i.e. what the gaps, barriers and challenges are in applying an intersectional lens).

Format of case study reports

There is no rigid template or fixed model for the case study reports. However, the case study reports should all have the following key elements:

- Some background information about the project and organisations involved.
- An overview of the research project. This includes a reasonably thorough indication of the background or rationale for the project. What is the central question or issue the project addresses?
- A summary of how the project and organisation(s) involved conceptualise "intersectionality, and/or an intersectional approach" or "lens", and how this has evolved overtime. This might also include a reflection on the similarities and differences between intersectionality and other conceptual frameworks or lens the project adopts (i.e. a feminist political ecology lens, critical feminist lens, Rutgers International GTA tool kit or a socio-ecological model).
- An analysis of how intersectionality was applied in the framing of the research "problem" or question.
- An analysis of how intersectionality was applied in the research design, methods and analysis, including a reflection on the successes, difficulties and challenges faced.
- An analysis of how intersectionality was applied in research engagement, policy uptake and application. This might also include a reflection on the opportunities, limitations, barriers and potential sensitivities that need to be carefully considered.
- An assessment of the value of an intersectional lens, gaps that need to be addressed, and thoughts on how to strengthen the capacity of researchers and practitioners to incorporate an intersectional lens in development research.

We expect the case studies to range between 8 000 and 10 000 words and to include a reference list.

Expectations

Case study authors will be expected to:

- Produce a case study report of approximately 10 000 words by end of October 2023 (details below).
- Participate in an online learning community that will meet once a month between April and September 2023. These roundtable discussions will support case study design and write-up and provide opportunities for researchers to engage and learn from one another.
- Collaborate with SCIS/IDRC on media and policy engagement to disseminate the case studies and synthesis report.
- Contribute to an academic publication (optional and to be confirmed).

Round tables

As part of this research initiative, and to support case study write-up, SCIS will host monthly roundtables online between April and September 2023. While the first meeting will clarify the objective of the project and the case study reports, the latter meetings will provide opportunities for researchers to engage, learn from one another and provide feedback. The round tables will also provide a learning environment for additional perspectives and critiques on intersectionality as a concept and research approach to be shared and debated.