

Joint PhD Programme in Diversity Management and Governance

PARTNER: UNIVERSITY OF BOLOGNA

A friendly workplace.

Trade unions and sexual diversity management in the EU and the Western Balkans

RESEARCH PROJECT

November 2009

Sexual diversity is recognised by the EU as one of the grounds for non-discrimination regulations and policies. Its protection is, therefore, one of the indicators for measuring the degree of integration of sexual minorities in a variety of contexts, including the workplace. On the other hand, discrimination and harassment at work remain among the core concerns for sexual minorities' safety and quality of life, both in the EU member states and the candidate countries of the Western Balkans. Against this backdrop, the role of trade unions is crucial and, indeed, transnational labour organisations have taken up the issue of sexual diversity in the protection of workers' rights. Through qualitative research, fieldwork, and case studies, this project seeks to explore processes, practices, and experiences of sexual diversity management within trade unions in the EU framework as well as to engage with the potential development of the field in Western Balkan countries.

Background

While it has been long recognised that organisations are gendered, the inclusion of sexuality into the study of organisational cultures and environments is a more recent development in both the academic and management fields. In the last few years, however, increasing attention has been paid to the awareness, recognition, and management of sexuality in institutions and organisations. Along with discrimination, harassment, and attraction, sexual orientation is obviously one of the facets of sexuality that shape and influence the working environment (see Kormanik, 2009). Nonetheless, the inclusion of sexual orientation in the definition and scope of diversity management and HR practices has yet to be universally recognised (see Trau and Härtel, 2003; Davis, 2009).

So far, the situation of sexual minorities in the workplace has been investigated within two main fields, i.e. psychology and organisation/management studies – the former focusing on the welfare of LGBT workers, the latter emphasising issues of performance and career development in a corporate perspective. Psychological research has studied the psychological stress of identity management and its negative impact on workers' health (see McDermott, 2006). On the other hand, in an organisational perspective, it has been widely acknowledged how discrimination negatively affects performance (see for example Congon, 2009). Theories of job motivation, involvement, and productivity suggest that workers who are treated with respect and fairness are more likely to work in a manner that promotes and enhances their organisation, their co-workers, and themselves. In addition, diversity has been envisaged as a factor of economic development by "creative capital" theorists (see Manning Thomas and Darnton, 2006).

If taking a comprehensive look at the literature on sexual diversity management in the workplace, there are a few key issues to be considered as regards sexual orientation in organisational contexts:

- ◆ homophobic/heterosexist bias and its effects on working climate and career development;
- ◆ identity management strategies of individual LGBT workers, ranging from silence to various degree of disclosure;
- ◆ awareness and visibility of sexual minorities as identity groups;
- ◆ leadership commitment to sexual diversity.

The first issue mainly relates to discrimination mechanisms – both formal (exclusion from hiring, advancement, and retention) and informal (tolerance of abuse) – that can affect the career development and psychological welfare of LGBT workers (Liddle *et al.*, 2004: 34). Namely, career development for LGBT people has become a fairly popular focus of investigation, with a wide range of concerns including for example the relationship between gender stereotypes and vocational choices (see Gedro, 2009), earning differentials for sexual minorities (see Van Loo and Rocco, 2009), and organisations' modes of engagement with sexual diversity such as hostility, compliance, inquiry, inclusion, and advocacy (see Rocco, Landorf, and Delgado, 2009).

Several studies in the second field (see for example Croteau, Anderson, and VanderWal, 2008) have examined, defined, and systematised identity management strategies (e.g. counterfeiting, avoidance, integration) and ranges of disclosure (e.g. passing, covering, being implicitly or explicitly out), while others have focused on the step of “coming out” and the factors – climate, timing, method – influencing acts of disclosure and their outcome (see King, Reilly, and Hebl, 2008). Special attention has been paid to the peculiar aspects of managing an invisible element of one's identity (see Anderson, Croteau, Chung, and Di Stefano, 2001), and namely to silence. In fact, far from discouraging attempts to address sexual minorities' issues, silence should be considered in its complex, multifaceted nature, as a product as well as an element of discourse (see Ward and Winstanley, 2003).

The third thematic focus explores education and advocacy policies of organisational change towards inclusion, safety, and equity (see Brooks and Edwards, 2009) as well as the development of resource/support of employee groups – established with varying degrees of formality – that deal with equal opportunities, access to domestic partner benefits and comprehensive non-discrimination policies, and transition issues in the workplace (see Githens and Aragon, 2009).

The last point – leadership commitment – is one of crucial importance for the creation of a safe working environment, the implementation of diversity policies, and the management of backlash and resistance to such initiatives. Indeed, studies on the implementation of diversity programs have pointed out a variety of factors that can influence the reception of such policies, including gender, age, and cultural empathy (see Cundiff, Nadler, and Swan, 2009). Active or passive resistance to inclusive policies is a common concern in many areas of diversity management and can itself be of diverse nature: emotional, cultural, social, and political. However, conservative reactions have been found to manifest themselves more blatantly when sexual orientation is concerned, given the lack of explicit, universal sanction for homophobia in the public discourse and the influence of homophobic political speech (Hill, 2009: 47).

The scientific literature on union approaches and policies with regard to sexual diversity is far less extensive than the one devoted to corporate environments. If, on the one hand, this may be easily explained by the weakness and limited relevance of unions in the US context – where most diversity studies have taken place so far, it does represent a considerable research gap in the European context, given the increasing amount of attention that European unions have been paying to LGBT rights over the last decade, though tentatively and still with limited effect (see Seckinelgin, 2009).

The interest of trade unions in sexual diversity has stemmed from the combination of a series of factors over the last decade or so. Economic globalisation, though contributing to the weakening of national labour organisations, has also provided an incentive for transnationalism and the expansion of unions' agenda. The context for the inclusion of LGBT rights into the general framework of labour protection was created by transnational political shifts in the following areas (see Hunt and Rayside, 2005):

- ◆ the emergence of human rights issues into the limelight of international relations;
- ◆ the development of transnational networks among feminist, LGBT, and other equity-seeking movements focusing on issues of gender, ethnicity, and sexual orientation;
- ◆ the growth of transnational labour organisations like the International Labour Organization (ILO), the International Confederation of Free Trade Unions (ICFTU), the European Trade Union Confederation (ETUC), Public Service International (PSI), and Educational International (EI).

Over the last ten years, international labour organisations have issued a number of documents and statements on LGBT workers' rights, including for example a pioneering joint publication by EI and PSI (1999, revised and updated in 2007) and an extensive equality report by ETUC (2008). Union networks have also cooperated with ILGA-Europe (European branch of the International Lesbian, Gay, Bisexual, Trans and Intersex Association) in projects aimed at enhancing equal opportunities in employment (2005). Activities and priorities within this framework have placed significant emphasis in the creation of an inclusive culture *within* labour organisations as well as on the issue of leadership commitment to sexual diversity. For example, unions' commitment to a successful management of sexual diversity may be evaluated by looking at the following indicators:

- ◆ the inclusion of sexual orientation in non-discrimination policies;
- ◆ the existence of an official committee or caucus for LGBT workers or unionists;
- ◆ the designation of an executive position for sexual minorities;
- ◆ the implementation of campaigns or educational programs devoted to sexual diversity.

Within the EU, further ground for unions' commitment to sexual diversity is provided by the Council Directive 2000/78/EC of 27 November 2000, that establishes a general framework for equal treatment in employment and occupation. Yet, according to ETUC, “there is little knowledge or awareness throughout Europe – including in trade unions – that sexual orientation is one of the non-discrimination grounds recognised at EU level” (<http://www.etuc.org/r/1355>). Thus, there is certainly space for further work in terms of awareness-raising as well as research on the perception, representation, and communication of sexual diversity within trade unions.

Research presentation

The interest in the specific relationship between unions and sexual minorities has stemmed from my previous research and fieldwork on LGBT/queer themes performed in the former Yugoslav space – a field I have been working on since 2005. In both my academic studies and my professional work at Osservatorio Balcani Caucaso, I have focused on a number of theoretical and practical issues, including the relationship between sexual diversity and nationalism, the development of LGBT and queer movements in the region, queer cultural production and festivals, and international cooperation in the LGBT field. In this context, especially over the last year, I had the opportunity to carry on a series of semi-structured, in-depth interviews with a variety of respondents, and namely to collect a number of life narratives. When asked about the worst moment in their personal or professional lives, several respondents mentioned losing their job because of their sexual orientation. While qualitative, anthropological research on limited groups is obviously not a valid statistic indicator, it does strengthen the rather natural intuition of the significance of workplace experience and climate for the overall quality of life of sexual minorities. In addition, the lack of protection against such episodes represents an obvious obstacle to the development of LGBT communities and activism, given the serious potential consequences of coming out (the act of self-disclosure of one's sexual orientation) and outing (accidental or malicious disclosure by others). Suffice it to say, for example, that Bosnia and Herzegovina counts *one* out LGBT activist in the whole country.

Against this backdrop, ensuring protection from discrimination in the workplace emerges as a crucial step for providing sexual minorities with equal opportunities and quality of life as well as creating the conditions for the development of LGBT communities and activism. In this context, the role of unions is crucial, and the interest of transnational labour organisations in LGBT issues, combined with the EU framework of non-discrimination policies, potentially provides momentum and instruments for such a development. However, lack of awareness and education in the working environment – including and especially in unions – needs to be addressed in order to create the necessary conditions. Such endeavour feels especially crucial in Western Balkan countries, where sexual minorities experience persisting discrimination as well as violence. In fact, workplace climate and fear of losing one's job place among the most serious concerns for sexual minorities – creating a safe working environment can thus be singled out as a crucial field of intervention for strengthening the position of sexual minorities in the region. This is why this project is oriented towards the study of sexual diversity management policies in trade unions in the EU context as well as the perspectives for Western Balkan candidate countries, who will be required to comply with basic standards of inclusion and protection for minorities during the integration process.

Trade unions potentially represent privileged contexts for observing mechanism of perception and representation – as well as management – of sexual diversity. In fact, in addition to being a context where policies and priorities are put forward and elaborated, trade unions can be looked at as organisations in themselves, i.e. *loci* where individuals are recruited, selected, and promoted – or not. Looking at the ways sexual orientation issues are addressed in labour organisations can also provide an opportunity to adopt a relational approach to the interaction between sexual identity groups (straight/LGBT), rather than isolating sexual minorities as deviations from the hegemonic context.

Therefore, the overall purpose of this research project, that could be summarised as an interdisciplinary and comparative study of sexual diversity management practices in a European integration perspective, is planned to include three main elements:

- ◆ a background study on the emergence of sexual diversity rights in labour protection;
- ◆ research work on experiences of sexual diversity management in unions;
- ◆ a fieldwork project (focus and scope to be defined according to the development of the research).

Methodology

The background study, including review and analysis of both scientific literature and policy documents, will be informed by an interdisciplinary theoretical framework drawing from contributions from fields such as sociology, anthropology, cultural studies, and public policy studies.

Following, the research work is intended to be of mostly qualitative character and will thus use the classic instruments of participant observation, in-depth semi-structured interviews, and content analysis. Interviews are planned to address trade unionists and consultants (initially contacted through the networks of unionists dealing with LGBT rights as well as NGOs) and focus on both specific policies (their design, implementation, and impact) and the comprehensive perception and representation of sexual diversity issues within unions. However, for a better contextualisation of the issue, research may also include a quantitative investigation aimed at defining the extent to which unions engage with LGBT rights (e.g., how many unions include sexual orientation in their non-discrimination policies, have specific positions that deal with sexual minorities, or take part in dedicated campaigns).

Further, according to research and logistics opportunities, the background study and the research work may be used to design a fieldwork project to be implemented – for example – in one of the Yugoslav successor states, in order to test perspectives for the protection of sexual minorities in the workplace in the region. At present, it seems premature to envisage such a project in detail. However, possible directions it may take – perhaps in cooperation with a local specialist NGO – include education, information, and awareness-raising in different possible forms (e.g., a journalistic investigation, production of written material, or organisation of a seminar).

During the conclusive year, the project will concentrate on analysing the empirical material collected on field and writing the dissertation, as well as participating in conferences or else giving visibility to the research work itself and its results.

Expected results

As far as is possible to anticipate in this preliminary stage, the research project is envisaged as expecting results in the following areas:

- ◆ filling a research gap on unions and sexual minorities in the EU context;
- ◆ identifying friendly practices in unions and issues to be addressed for the creation of a safe, positive working environment (leadership, education, support);
- ◆ explore and evaluate the perspectives for this field of intervention in the Western Balkans.

References

- Anderson, M., J. Croteau, B. Chung, and T. Di Stefano (2001). "Developing an assessment of sexual identity management for lesbian and gay workers". *Journal of Career Assessment* (9). 243-260.
- Brooks, A. and K. Edwards (2009). "Allies in the workplace: including LGBT in HRD". *Advances in Developing Human Resources* (11). 136-149.
- Congon, M. (2009). "Sexual minority issues in human resources development". *Advances in Developing Human Resources* (11). 3-6.
- Croteau, J., M. Anderson, and B. VanderWal (2008). "Models of workplace sexual identity disclosure and management. Reviewing and extending concepts". *Group & Organization Management* (33:5). 532-565.
- Cundiff, N., J. Nadler, and A. Swan (2009). "The influence of cultural empathy and gender on perceptions of diversity programs". *Journal of Leadership & Organizational Studies* (16:1). 97-110.
- Davis, D. (2009). "Transgender issues in the workplace: HRD's newest challenge/opportunity". *Advances in Developing Human Resources* (11). 109-120.
- Gedro, J. (2009). "LGBT career development". *Advances in Developing Human Resources* (11). 54-66.
- Githens, R. and S. Aragon (2009). "LGBT employee groups: goals and organizational structures". *Advances in Developing Human Resources* (11). 121-135.
- Hill, R. (2009). "Incorporating queers: blowback, backlash, and other forms of resistance to workplace diversity initiatives that support sexual minorities". *Advances in Developing Human Resources* (11). 37-54.
- Hunt, G. and D. Rayside (2005). "Labour internationalism and the recognition of sexual diversity". Paper presented at the annual meeting of the American Political Science Association. Marriott Wardman Park, Omni Shoreham, Washington Hilton, Washington, DC, September 1st, 2005.
- King, E., C. Reilly, and M. Hebl (2008). "The best of times, the worst of times. Exploring dual perspectives of 'coming out' in the workplace". *Group & Organization Management* (33:5). 566-601.
- Kormanik, M. (2009). "Sexuality as a diversity factor: an examination of awareness". *Advances in Developing Human Resources* (11). 24-36.
- Liddle, B., A. Darrell, A. Hauenstein, and K. Schuck (2004). "Construction and validation of the Lesbian, Gay, Bisexual, and Transgendered Climate Inventory". *Journal of Career Assessment* (12:1). 33-50.
- Manning Thomas, J. and J. Darnton (2006). "Social diversity and economic development in the metropolis". *Journal of Planning Literature* (21). 153-168.

McDermott, E. (2006). "Surviving in dangerous places: lesbian identity performances in the workplace, social class and psychological health". *Feminism Psychology* (16). 193-211.

Rocco, T., H. Landorf, and A. Delgado (2009). "Framing the issue/framing the question: a proposed framework for organizational perspectives on sexual minorities". *Advances in Developing Human Resources* (11). 7-23.

Seckinelgin, H. (2009). "Global social policy and international organizations: linking social exclusion to durable inequality". *Global social policy* (9). 205-227.

Trau, R. and C. Härtel (2003). "Diversity management for sexual minorities". *International Journal of Diversity in Organisations, Communities and Nations* (3).

Van Loo, J. and T. Rocco (2009). "Sexual minorities, earnings, and career development: insights from economics". *Advances in Developing Human Resources* (11). 82-94.

Ward, J. and D. Winstanley (2003). "The absent presence: negative space within discourse and the construction of minority sexual identity in the workplace". *Human Relations* (56). 1255-1280.