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Authors: Quack, Sigfrid; Theobald, Hildegard  
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## **CROSS-SOCIETAL COMPARISON OF GENDER AND SOCIO-ECONOMIC SUBTEXT: UNRAVELLING UNIVERSALISTIC MYTHS ABOUT GENDERING OF ORGANIZATIONS**

**By Sigrid Quack and Hildegard Theobald<sup>1</sup>**

First things first: Happy Birthday, Janne!

“Big birthdays” are a welcome opportunity to look back and revisit earlier work in the light of contemporary debates. In this paper, we will take a look at contemporary debates on gendered organizations and discuss what cross-societal comparisons of variability and changeability, as elaborated in our joint article from 2002 (Tienari et al., 2002), can contribute to a future research agenda on gender, class and ethnic (in)equality in organizations.

Research on the gendering of organizations has been motivated by the search for explanations of the persistence and change of gender inequalities across societies. In this context, Joan Acker’s (1990) concept of a gendered substructure has been a prominent reference point. It refers to “often-invisible processes in the ordinary lives of organizations in which gendered assumptions about women and men, femininity and masculinity, are embedded and reproduced, and gender inequalities perpetuated” (Acker, 2012: 215). The gendered substructure is produced and reproduced through organizational processes, culture, interactions on the jobs, and gendered identities. One important element of the substructure is the gendered subtext, defined as those parts of the substructure that are “texts, explicit or implicit, written or just common practice, that shape the gendered processes and structures” (Acker, 2012: 217). Another important element is the notion of the gender neutral, abstract worker “implicitly built on the image of a gender neutral, abstract worker who has no body and no obligations outside the work place: this worker is unencumbered” (Acker, 2012: 218). Acker’s (1990) concept of a gendered substructure has been influential in guiding empirical research on gendered organizational, cultural, interactional, and identity processes (for reviews see Bendl, 2008; Benschop and Doorewaard, 2012).

In light of more recent feminist and queer theorizing, however, it has been argued that the concept of gender subtext should be revised and expanded in

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<sup>1</sup> The baby that was once with us when we met Janne to discuss our research in Finland is now a young adult and corrected this paper. Thank you Nepheli!

at least in two ways. First, debates on the intersectionality of multiple inequalities are highly relevant for organizational research and call for a more differentiated analysis of organizational, cultural, interactional, and identity processes. Therefore, Benschop and Doorewaard (2012) propose a new notion of “gender<sup>plus</sup> subtext” in which gender is an important, but not the only aspect, and class and ethnicity are also taken into account. Second, queer theorists have pointed to the all too simplistic binary conception of gender that contrasts “female” and “male” while ignoring other genders. Accordingly, organizational research should move beyond heteronormative gender dichotomies to examine how organizational substructures contribute to inequalities between people with multiple LGBT gender identities (Bendl, 2008).

Furthermore, Benschop and colleagues (2012: 1) observed that despite a growing body of research on gendering of organizations, very little is still known “about how to ensure sustainable change” in favor of gender, class, and ethnic equality in organizations. The authors discuss four possible reasons: The first is discursive ambiguity in the organizational literature itself about what constitutes a change towards “gender equality.” The second is that fairness, equality, and inclusion are not only a matter of gender, but also of class and ethnicity, and possibly even more dimensions. Thus, there is need for research to integrate insights from theorizing on intersectionality. Third, the authors argue that more attention should be paid to social context and the situatedness of change. “Change initiatives in organizations may take different forms and shapes within the ‘same’ industries and occupations in different nation-states and local settings” (Benschop et al., 2012: 3). Combining these three challenges might help to resolve the fourth problem, which, according to the authors, consists of an all too simplistic conceptualization of change in gendered substructures of organizations. Empirical studies should distinguish more carefully between processes which disrupt existing gender norms and expectations in organizations and others that might lead to their persistence or generate new ones (Benschop et al., 2012: 4).

We agree that research has tended to focus on processes that reproduce gender inequality rather on their variety and (often incremental) changeability. In particular, the societal environment of organizations has often not received the scholarly attention it deserves. Gender inequalities are often traced back to the separation of production and reproduction, public and private sphere, as perpetuating hierarchical gender relations. Yet, what is considered as part of the public and private sphere varies considerably between welfare states across the OECD countries, as do national employment and care models (Pfau-Effinger, 1993; Bettio and Plantenga, 2004; Simonazzi, 2009). In addition, family policies, educational background and employment patterns interact in significant ways (Grunow

et al., 2011). Surprisingly little research has tackled how welfare state policies in areas of child and elderly care intersect with gendered substructures in organizations, and how changes in these policies have an effect on gender, class, and ethnic inequalities in organizations.

In sum, these arguments call for more cross-societal comparison in research on gendered organizations. In order to illustrate the possible benefits of such a research perspective, in the following sections we will briefly compare the findings of our joint research with Janne on organizational reforms in Finnish and German banks with results of Theobald and colleagues' (2013) research on changes in Swedish and German eldercare organizations. In both studies, the comparison between organizations located in countries with contrasting (universal versus Bismarckian) welfare states is helpful to highlight how institutional and cultural expectations about the division between public and private penetrate the gender substructure of organizations. In the second case study on eldercare, we also extend the original framework to a combined analysis of gender and socio-economic substructures in organizations and raise questions whether the abstract ideal worker is still necessarily built on masculine imagery.

## **ORGANIZATIONAL REFORMS AND GENDER SUBTEXT IN FINNISH AND GERMAN BANKS**

In our work with Janne we analyzed how organizational reforms in banks impacted the underlying gendered notions of organizing responsibilities and work in lower middle management positions of branch managers (Tienari et al., 2002). At the time of our study, the proportion of women employed in the traditionally male-dominated banking sector was rising in many European countries and critical questions were being raised regarding why the increase in qualified female employees was not translating into more women being promoted to become bank managers (Quack, 1997; Quack and Hancké, 1999). Simultaneously, globalization and economic restructuring led banks to implement radical organizational reform programs with open-ended outcomes for the gender composition of their leadership. The confluence of more long-term changes in the gender composition of bank employees and radical organizational reforms offered the opportunity for critical case studies of gendered organizational subtext in a situation of flux. Rather than taking gender subtext as a constant, we were interested in how it changes over time.

We argued that gender subtext is something that evolves over time and is by no way static, and that the pathways along which organizational gender subtexts evolves in times of organizational reform cannot be understood

without taking into account the existing gender orders in their broader societal context. Here we drew on comparative welfare state and gender literature, which argues that the divide between the public and private sphere is one important dimension of societal gender orders (Connell, 1987) that penetrates organizations and shapes the gender subtext in organizations in manifold ways. The comparison of organizational reforms in Finnish and German banks provided a unique opportunity to explore their impact on the gendered subtext of organization in contrasting societal contexts: Finland was considered a prime example of a universalistic welfare state that provides early child care and education throughout the entire country and thereby fosters a double earner and full-time employment model for women and men. In contrast, Germany exemplified (at the time of the study) a conservative welfare state in which care for small children was primarily the responsibility of families, and where family and fiscal policies favored a modernized male breadwinner model (Esping-Andersen, 1990; Pfau-Effinger, 1993; Bettio and Plantenga, 2004).

By envisaging cross-societal variability and intra-organizational changes in gender subtext, we critically engaged with a tendency in the literature that sought to demonstrate the preponderance of often-concealed, power-based gendering processes as a universal phenomenon rather than investigating the sources of its diversity and mutability. Building on and elaborating further previous work by Acker (1992) and Benschop and Doorewaard (1998 a, b), we emphasized “that gendered notions with regard to qualifications, work-orientation and care responsibilities are not fixed. ... There is an element of potential transition in gender distinctions and relations, then, particularly when organizational life becomes the subject of reforming. Such transition, however, finds its constitution in the particular societal context in which the organization – and organizational reforming – is embedded.” (Tienari et al., 2002: 254).

Our empirical research revealed that gendered notions of qualifications, availability, and work orientation attached to branch management positions changed in distinctive ways in Finland and Germany and that these differences could be explained by distinctive features of their surrounding societal gender orders. In the course of the organizational reforms undertaken by the Finnish case study bank, branch management transformed from a male to a female imagery, with underlying notions that women were better at “taking care” of staff and retail customers in different times of sectoral crisis. In the German case study bank, the notion of an abstract ideal worker was transformed into gender-ambiguous imagery that tolerated women in branch management for a transitory period until they had children. Interestingly, gendered discourses and practices throughout the reform differed considerably between the Finnish and German banks studied for our research. At the time, we concluded that “*while, in Germany,*

*the question of availability is the key determinant of the gendered 'ideal worker', in Finland gendered practices and discourses related to qualifications dominate*" (Tienari et al., 2002: 274, emphasis in original). Furthermore, while the German bank was characterized by a relative monolithic set of masculine assumptions regarding the availability and work-orientation of management in general, which were justified by claims that women lacked the required qualifications, the Finnish case bank was moving towards a more varied set of gendered subtexts for different types of management positions, ranging from the increasingly feminine imagery of the branch manager as "carer" to more masculine subtexts in business banking and higher management.

Tracking over time the development of *Leitbilder*, rules and practices as three different, but intersecting dimensions of organizational change and reproduction, we showed that in the Finnish bank top-down and bottom-up processes mutually reinforced the redefinition of the gender subtext in branch management from male to feminine assumptions. In the German case study bank, in contrast, societal models of the male breadwinner family and of small children being taken care of best by their mothers were so prominent among top managers as well as potential female applicants for branch management, that despite some young women displaying success in branch management and thereby changing practices and expectations at the micro level, none of these changes trickled up into the organization's rules, routines or even into the organizations reform goals and *Leitbilder* (Quack et al., 2004).

In sum, our study highlighted the "contradictory dynamics by which gender distinctions and relations evolve and become redefined in organizations" (Tienari et al. 2002: 274) and called for a research agenda that focuses on cross-societal and longitudinal variety in gendered organizing. However, looking back, it also remained wedged in prevailing binary conceptions of gender (for a critique see Bendl, 2008) and did not pay attention to interdependencies between gender, class or ethnicity – categories, which have attracted much attention in current debates on intersectionality. Benschop and Doorewaard (2012: 225), for example, have recently called for a revisited notion of "gender<sup>plus</sup> subtext" to take the interference of multiple inequalities in organizations into account. We believe that both criticisms are well-founded and open up avenues for new directions in research. Yet, from our vantage point, future research on queering, i.e. attempts to politicize binary notions of gender in organizational reality and discourse (Bendl, 2008: S61), as well as on intersecting dimensions of gender, class, and ethnicity in organizational and societal inequality, will benefit from pursuing a comparative research agenda, in terms of both its cross-societal and its longitudinal dimension. In the following section, we will illustrate the additional insights of such an

approach, drawing on recent research of one of the authors on changing gender and socio-economic subtext in organizations of the Swedish and German eldercare sector (Theobald et al., 2013). Being well-aware that class is a rather contested concept, we limit our analysis in this paper to differences in socio-economic status as indicated by occupational qualification levels as a rather rough approximation. Occupational qualification levels can be regarded as one of three central elements – besides occupational positions and wages - of a socio-economically-oriented class concept.

## **GENDER AND SOCIO-ECONOMIC SUBTEXT IN CHANGING SWEDISH AND GERMAN ELDERCARE**

In recent decades, population aging has dramatically expanded the need for and provision of eldercare in industrialized countries. While most countries are moving towards a combination of home care, private provisions, and cash transfers, national care regimes differ significantly in their mix, as well as employment models in this sector (Simonazzi, 2009). Accordingly, organizations struggling to resolve the contradictory demands of providing affordable but also qualitatively adequate care for elderly people are confronted with rather different societal and institutional expectations. Therefore, if we seek to extend our analysis of gendered subtexts in organizations by combining it with socio-economic inequalities as reflected in qualification levels, it is important that we analyze eldercare organizations as embedded in this broader societal and institutional context. The following analysis focuses on eldercare in Sweden and Germany, these two countries representing similarly contrasting contexts as in the study on banking. The Swedish care regime, notwithstanding some recent re-familiarization (Szebehely and Trydegård, 2012) tends to provide publicly financed and affordable elderly care for all citizens, while a move from family subsidiarity towards “free choice” in Germany is characteristic of recent developments of care regimes in Bismarckian welfare state systems (Morel, 2007).

What distinguishes the eldercare from the banking sector is that in most Western societies it has been historically a sphere of female activity, no matter whether it has been undertaken as unpaid family work or as paid employment. This raises the question of whether one of the key tenets underlying the concept of the abstract ideal worker really makes sense for analyzing the gendered and socio-economic subtext in this sector. To what extent can we assume that organizational rules in eldercare (ever) refer (red) to a gender-neutral abstract worker that is unencumbered, i.e. has no obligations outside the work place? Could it be that the “real life ideal worker”, i.e. the specific qualifications, abilities etc. that employers according

to Acker (2012: 218) also have in mind when hiring employees, has historically shaped underlying notions of the abstract worker?

A second distinguishing feature between the sectors is that interdependent inequalities based on gender, socio-economic background and ethnicity have attracted more scholarly attention in care than in banking (Theobald (2011); van Hooren (2012); Shutes (2014)). In the following, we draw on Walgenbach (2007), who defines gender as a heterogeneous social category that is socially constructed in specific contexts and combines different forms of inequalities, to examine interdependencies between gender and socio-economic subtext in Swedish and German eldercare organizations. Empirically, the following analysis draws on an empirical study of a representative sample of care workers in Sweden and Germany (Theobald et al., 2013).

As a traditionally female-dominated activity eldercare work shows a clearly gendered image in both countries. Independently of different welfare policies in this sector, the underlying conception of the ideal worker is a feminized one in all the eldercare organizations studied by Theobald et al. (2013). Not only do managers in these organizations conceptualize work in the sector as women's work, but the abstract ideal worker is also not assumed to be gender neutral and "unencumbered." On the contrary, organizations often deliberately assume that workers are limited in their availability and offer part-time arrangements so that they can combine their job with family responsibilities. Furthermore, wages in the sector are significantly lower than those of equally qualified men, also pointing to a feminized concept of ideal worker traditionally associated with female employment.

How forms and degree of socio-economic inequalities between female employees intersect with organizational substructures in the eldercare sector, however, differs significantly between Sweden and Germany (see Theobald et al., 2013). The most obvious difference is the emphasis given to the professionalization of care work and the manner through which it is pursued. Entry requirements for doing care work, as well as expectations of what constitutes a good care worker in terms of occupational degrees and the level of training required are constructed very differently in organizations in each country. In Sweden, professionalization strategies are available for care workers on all levels, converging towards an integrated professionalization path in Sweden. In Germany, in contrast, professionalization approaches are more fragmented and oriented mainly towards a middle level of qualified care workers. For example, according to 2012 statistics in Sweden, 83% of residential care workers had obtained care-related training and a majority of them had completed a 3-year occupational training program (NHBW, 2013). In Germany, in 2011 approx. 50% of care staff in residential care had acquired qualified care-related training, while 44% of care staff had not acquired any care-related training even on an assistant level (Federal Statistical Office, 2013).



Country-specific professionalization approaches are interrelated with other significant elements of the gender and socio-economic subtext within organizations (see Theobald et al., 2013). The more egalitarian socio-economic composition of Swedish care workers is mirrored by prevailing forms of work organization. In Swedish eldercare organizations, care tasks are autonomously organized by the team itself and shared equally among its members reflecting existing but rather small differences in training. In contrast in German eldercare organizations, the more fragmented professionalization system goes hand in hand with a stricter division of care tasks among care workers with different qualification levels. Furthermore, supervisors have a stronger influence on the work organization of teams, while the less trained care workers have very little discretion at all. The research also revealed additional socio-economic dimensions of inequality within organizational bureaucracies, like type of employment contract, social security contributions, and others (on socio-economic dimensions in organisations in general see Acker, 2010).

All in all, these findings indicate that the definition of qualification levels in the socio-economic subtext in eldercare organizations is contingent on the broader societal context, which is characterized by contrasting welfare state policies and professionalization approaches. In combination, these two factors generate distinctive societal contexts for socio-economic inequalities to flourish or not within the care sector. The promise of the Swedish universalistic welfare state to provide public elderly care is combined with egalitarian cultural values regarding the right of education and self-realization in the workplace for the whole population (Strath, 2005). The more ambiguous "free choice" approach recently followed the German corporatist welfare strengthens the role of the family and impedes a comprehensive professionalization of care tasks. This is combined with an employment approach focused on a mix of trained and untrained care workers.

There are indications that market-oriented reforms may strengthen socio-economic hierarchies in the future and thus lead to further changes of organizational subtext in both countries (see Theobald et al., 2013). In Sweden, for-profit providers (approx. 20% of providers) employ less qualified care workers more frequently than the public sector, while in Germany the hierarchical division of care tasks is strengthened by the introduction of new, less qualified training programs and a stricter division of care tasks. The impact of market-oriented restructuring is visible in the increasing proportion of precarious working-time arrangements. Yet, the trend to employ care workers on a short-term basis, on hourly contracts or with lower social security contributions, especially for less trained care workers, takes different forms in both countries. While in Germany these working-time arrangements are found among care workers of all age groups, in Sweden they are limited to newly recruited staff during their introductory

period. Furthermore, while there has been an overall decrease in wages for less-trained care workers in German eldercare, in Sweden this applies only to for-profit organizations. Hence, despite a common trend towards more marketization, country differences related to societal context still prevail. In Swedish eldercare, the goal of continuous and regular female employment over the life cycle for all women independent of training levels is still the predominant orientation, whereas many low-skilled jobs in German eldercare are often considered as precarious and provide an additional income to the family income at best.

Starting with the analysis of the interplay of private-public divide and professionalization approach, our analysis revealed the country-specific intersection of socio-economic and gender in eldercare organizations in Germany and Sweden. We showed that a feminized ideal worker is differentiated in country-specific ways in terms of socio-economic inequalities. The cross-country comparison showed a more egalitarian subtext and definition of the ideal worker in Sweden in terms of work time, wages, and division of work. Following market-oriented reforms, eldercare work is currently being restructured and socio-economic distinctions in the subtext and the concept of ideal worker are strengthened in both countries albeit along distinctive trajectories and to a different extent.

## **WHERE TO GO FROM HERE?**

Our illustrative case studies of organizational change and gender substructure offer multiple perspectives for fruitful comparison. First, the contrast between historically male and female-dominated sectors raises questions about underlying conceptions of the abstract and real ideal type worker, and the nature of gendered expectations that employers have when hiring, employment and (not) promoting workers. More empirical and conceptual work is needed to clarify what these assumptions are actually like in different contextual settings. Second, comparing banking and eldercare within a given country shows that interdependencies between social background, educational degrees, and gendered inequality in the workplace do not only play out within organizations but also between different sectors, and in complex ways if female employees in skilled-sectors draw on social services provided by women employed in low-skilled sectors. Third, the contrast of institutional and societal context in universalistic and Bismarckian welfare states with a distinctive family policy, care regimes, and employment models underlines that context matters for organizational change strategies: Gendered organizational substructures do not evolve in a vacuum, but are closely interwoven with societal institutions, culture, and politics (see also Tienari et al., 2010). More comparative empirical analysis of multiple intersecting gender orders at organizational, sectoral and societal

levels will not only provide a better data base, but can also offer a laboratory for thought experiments about how societal policies can foster or hamper organizational initiatives for more equality and inclusion.

Maybe, it is time for a renewed Finnish-German research collaboration?

Happy birthday, Janne!

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*Inspired by Janne's work/words*